PCGenesis

Current Status & Future Plans

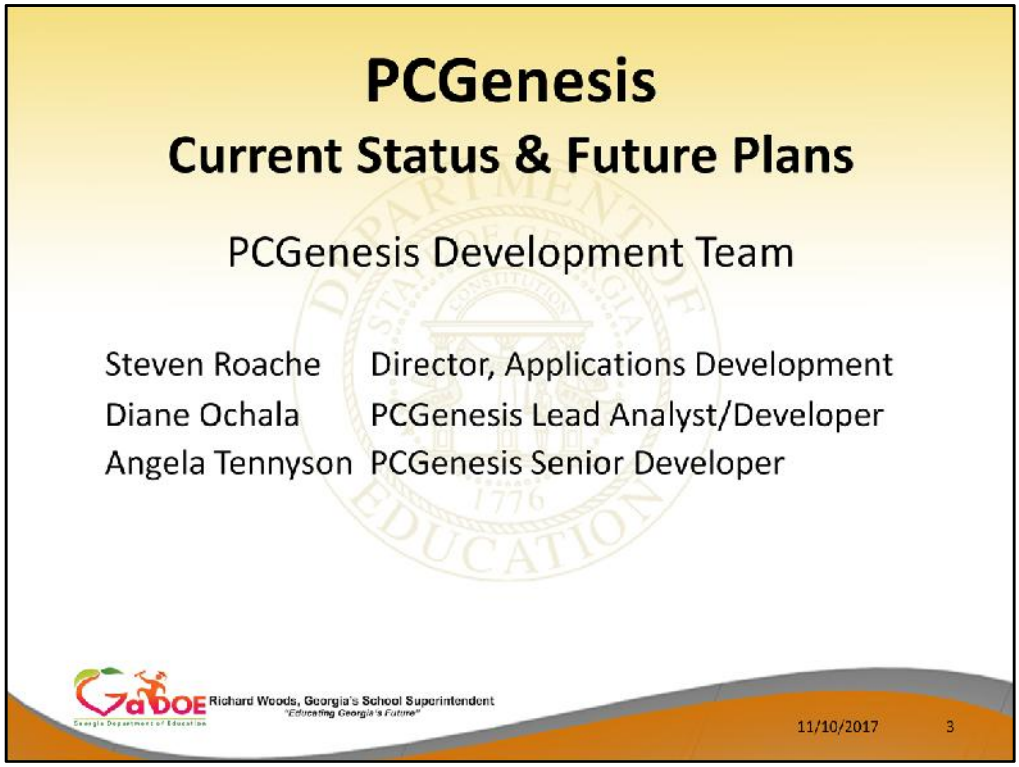
GASBO

Augusta, GA

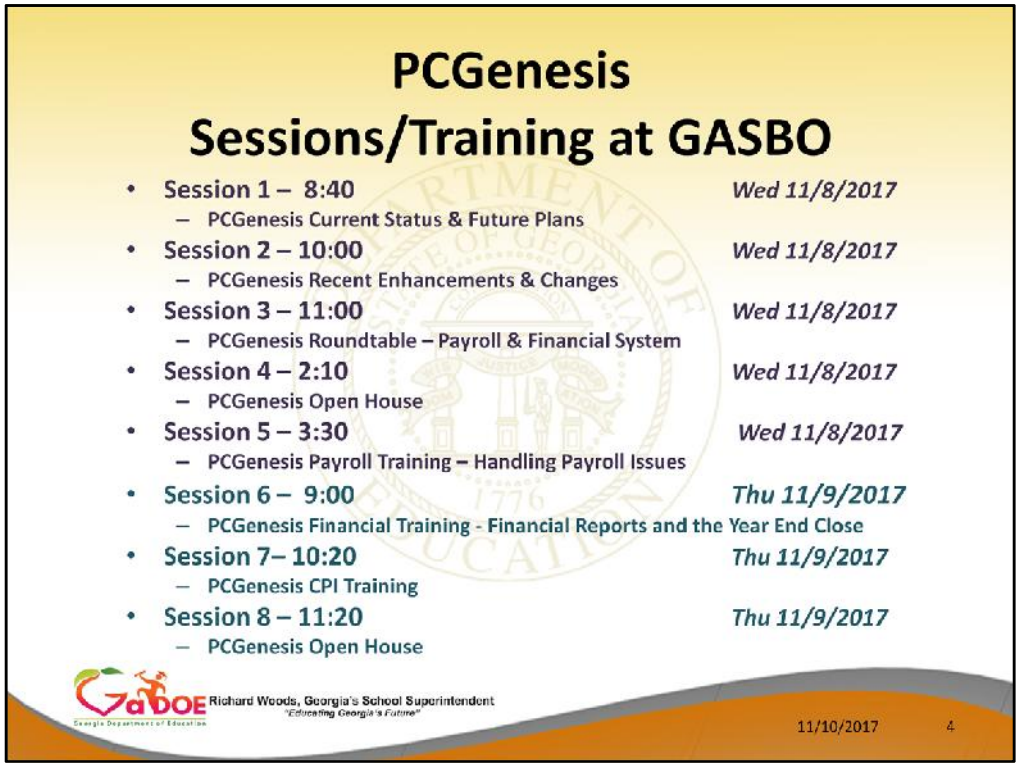
November 8, 2017

Agenda

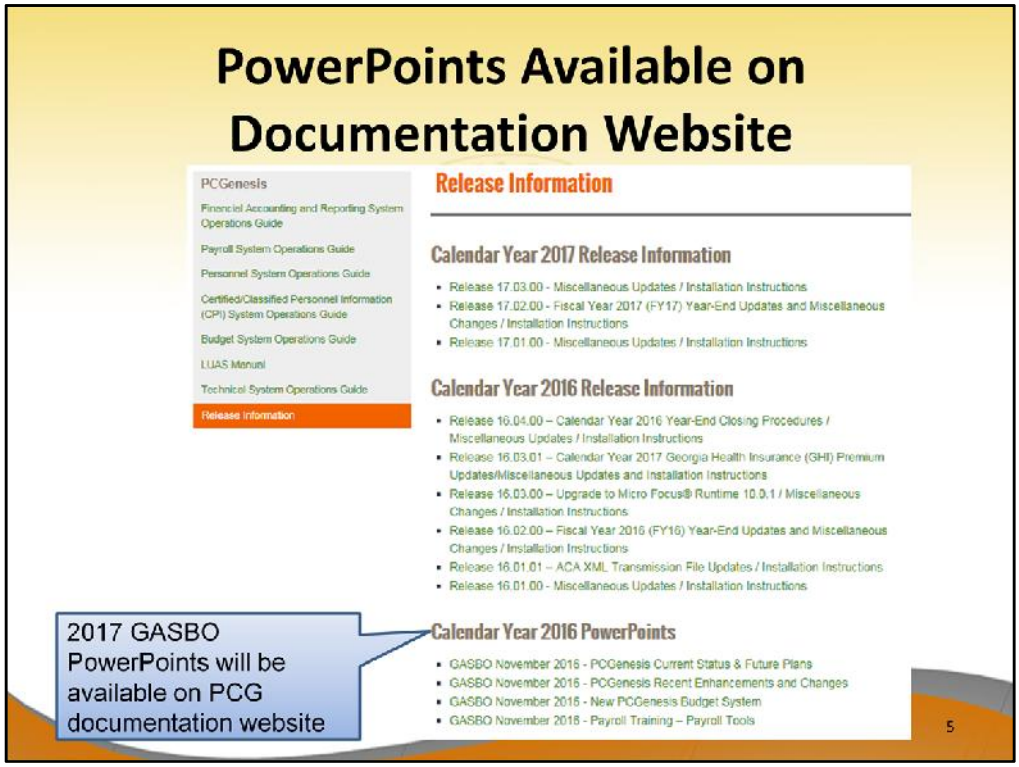
- **Introduction**
- Upgrade to Micro Focus® Runtime 10.0.1
- Upgrade of PCGenesis Print Queue
- What's Next
- Getting Ready for 2018 GHI
- User Input



- Good morning & welcome to the PCGenesis Current Status & Future Plans Session. Steve, Angela & I thank you for coming today. I would also like to introduce our manager, Steven Roache, who is attending GASBO this year as well.
- Please feel free to make comments or ask questions during the presentation. When we get to the future plans portion, we need your input to help us focus on your needs. So all of you, please join in the discussion.



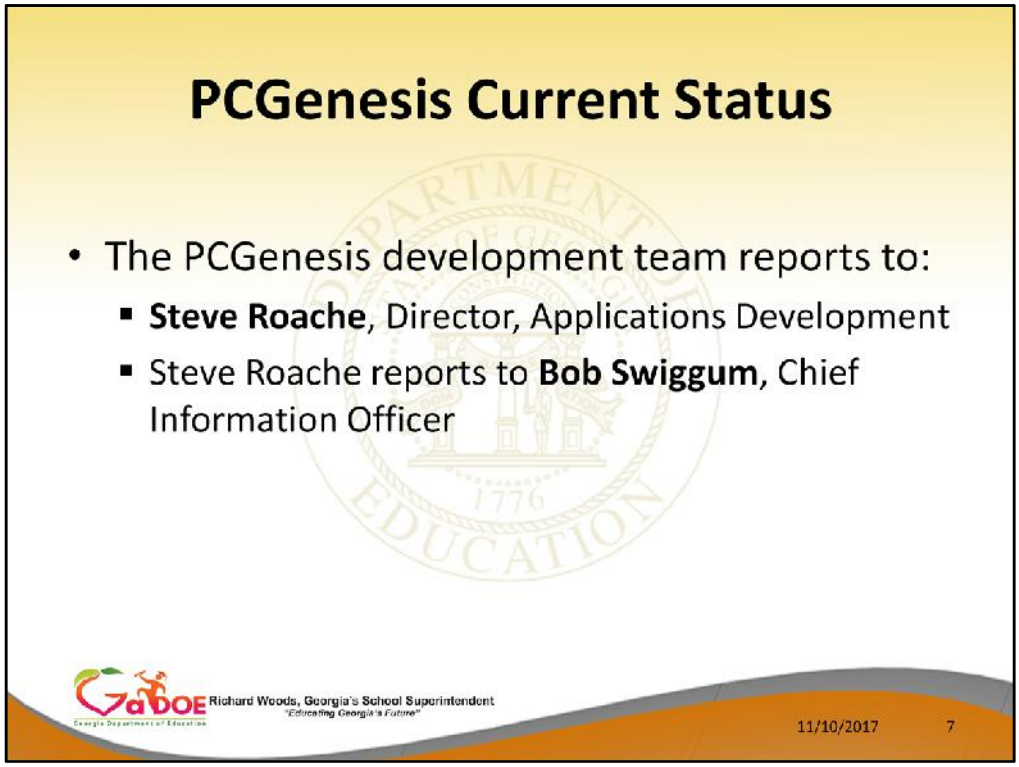
We have a full schedule here at GASBO this year. We have our two standard PCG sessions this morning. We also have two open house sessions, one roundtable, and three payroll training sessions. Katie Green from the DOE help desk has kindly offered to do the three training sessions for PCGenesis. And I want to give a big "thank you" to Katie.



All of today's PowerPoint presentations will be available on our documentation website under 'Release Information'. We will publish the PowerPoint along with the presenter's notes for future viewing.

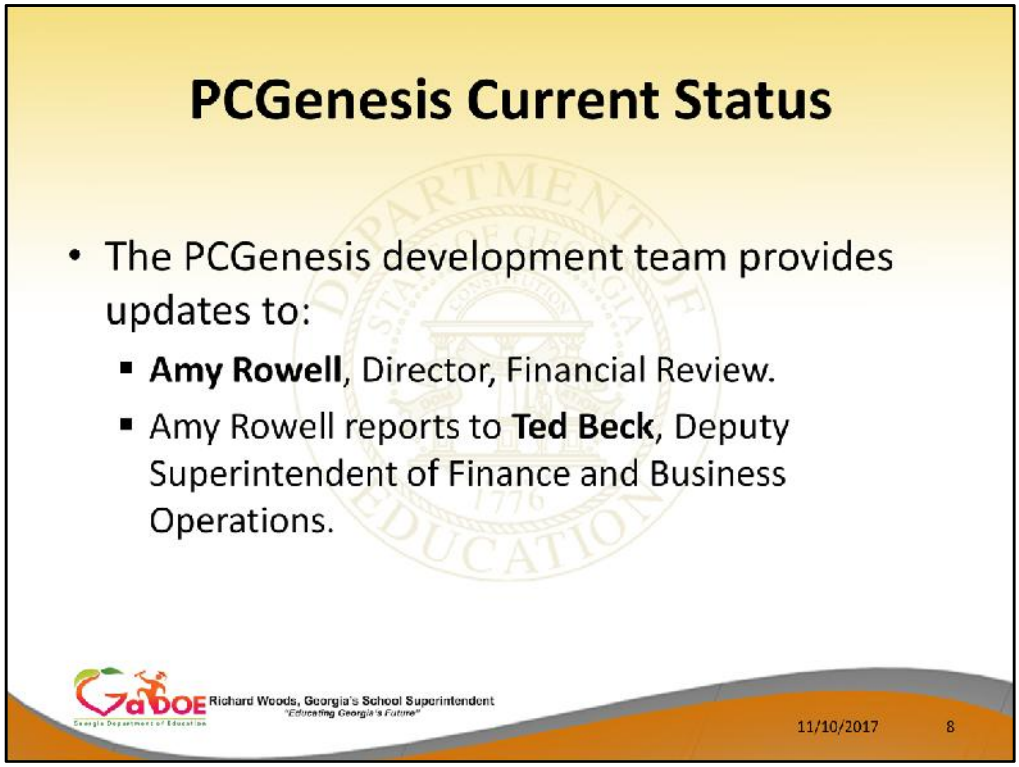
PCGenesis Current Status

- The PCGenesis Development Team:
  - Diane Ochala
  - Angela Tennyson
  - Karen McArthur

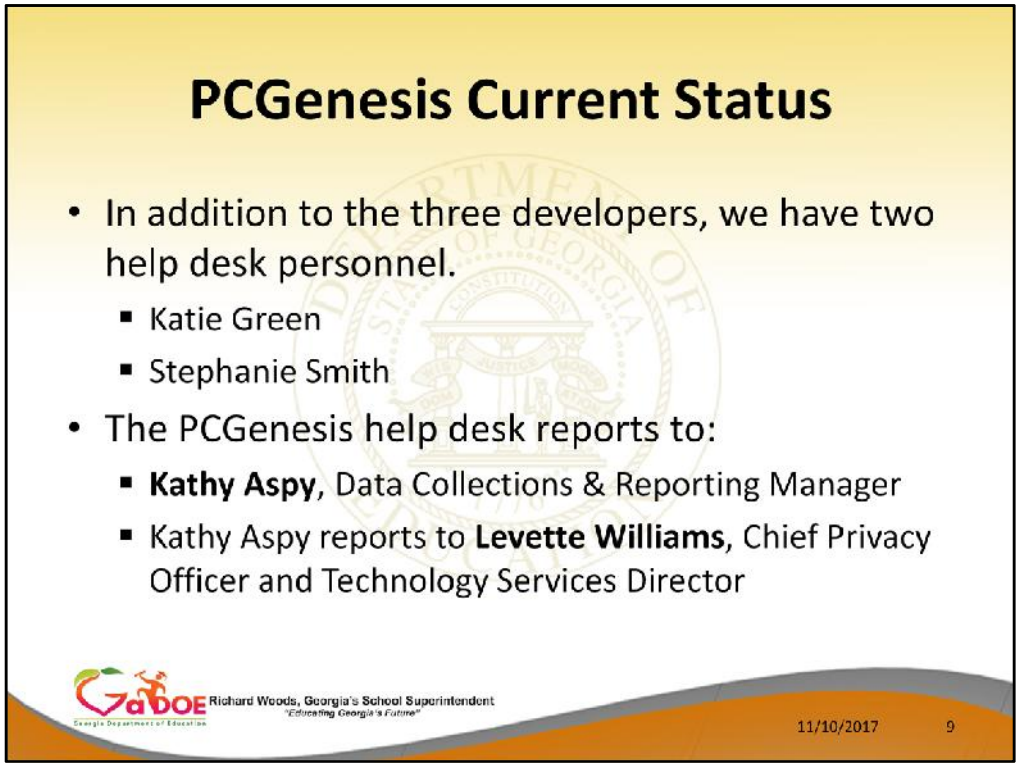


The PCG development team reports to two different branches at the DOE.

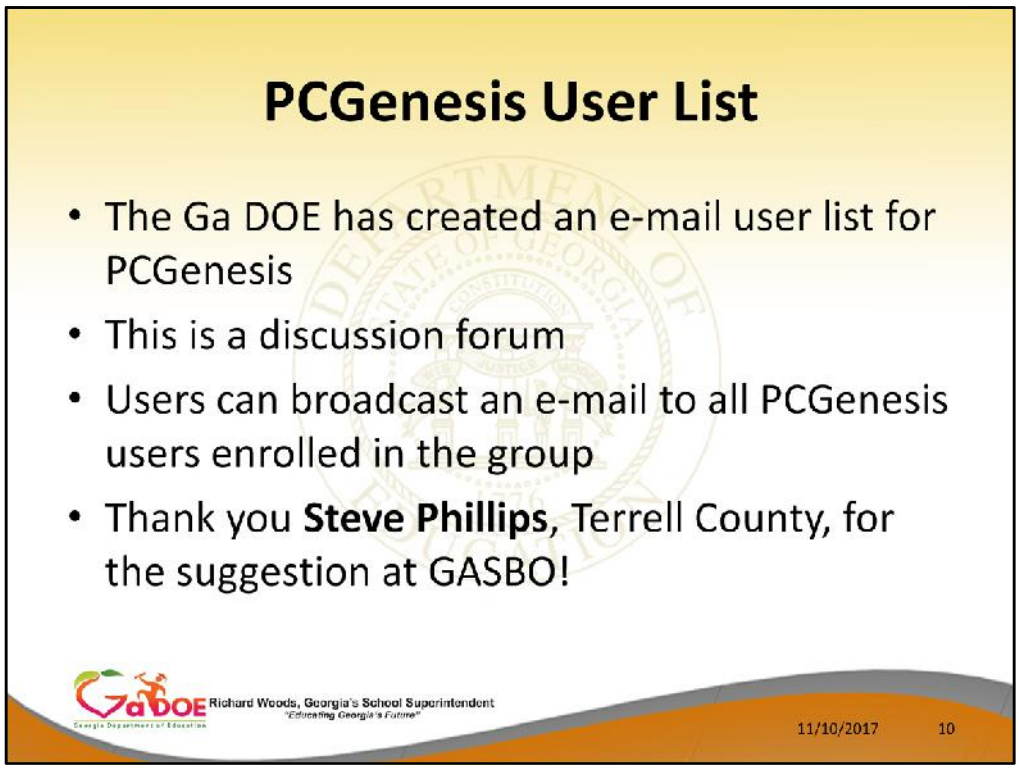
Angela and I directly report to the IT department. Our direct manager is Steve Roache and Steve reports to the Chief Information Officer, Bob Swiggum.



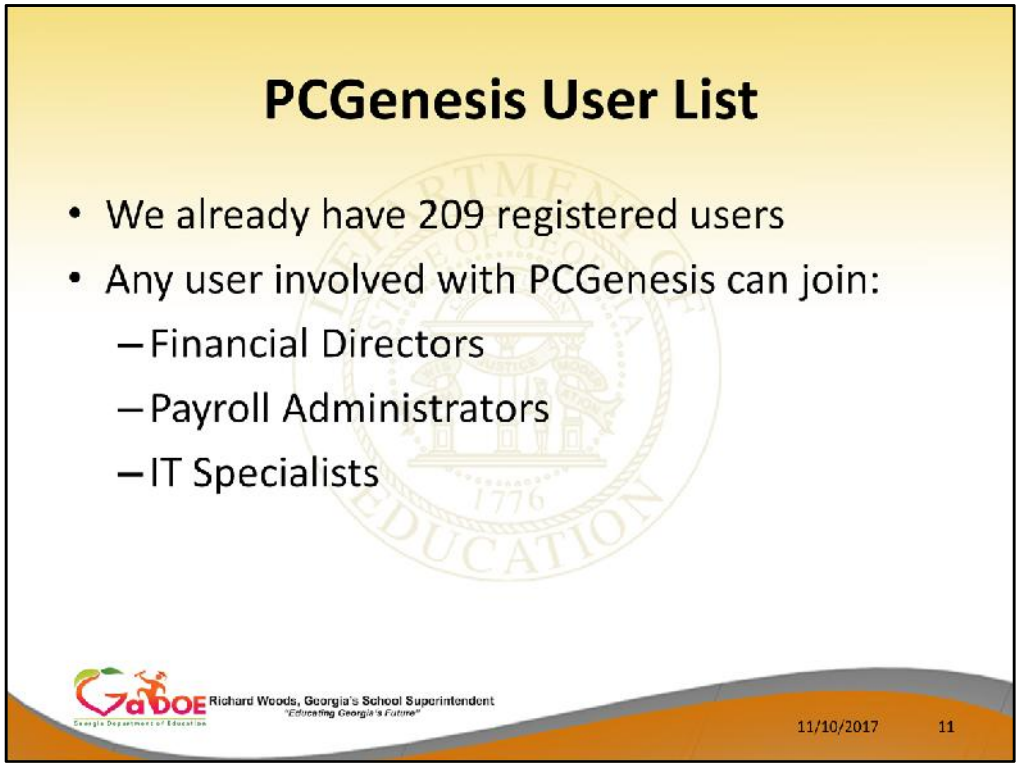
The PCGenesis development team also provides updates to the DOE Financial Review Department, specifically Amy Rowell, the Director of Financial Review. Amy reports to Ted Beck, Deputy Superintendent of Finance and Business Operations.



PCGenesis also has two help desk personnel who report to Kathy Aspy, Katie Green, and Stephanie Smith. Kathy Aspy reports to Levette Williams, the Chief Privacy Officer and Technology Services Director.



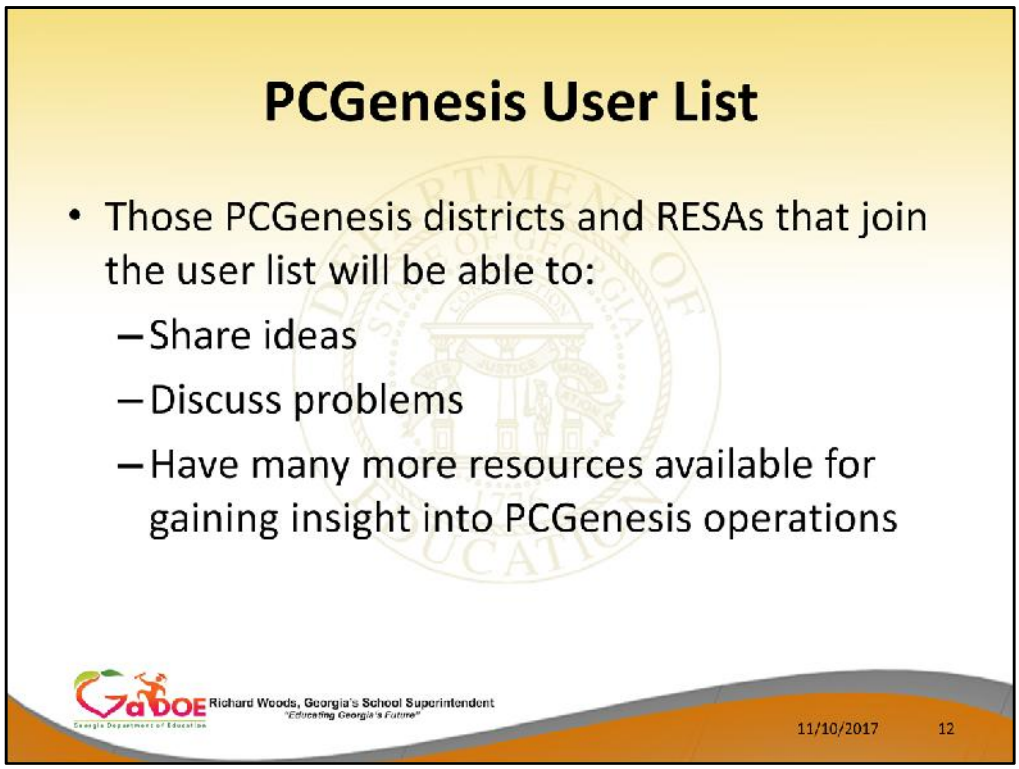
- This past year, the PCG team has implemented a new e-mail user list for PCGenesis.
- PCGenesis users can use the e-mail list to broadcast e-mails to all users enrolled in the group. The e-mail list can be used as a discussion forum.
- I want to thank Steve Phillips of Terrell County for providing the suggestion for the e-mail list at last year's GASBO. Thank you Steve!



The PCGenesis e-mail list already has 209 registered users.

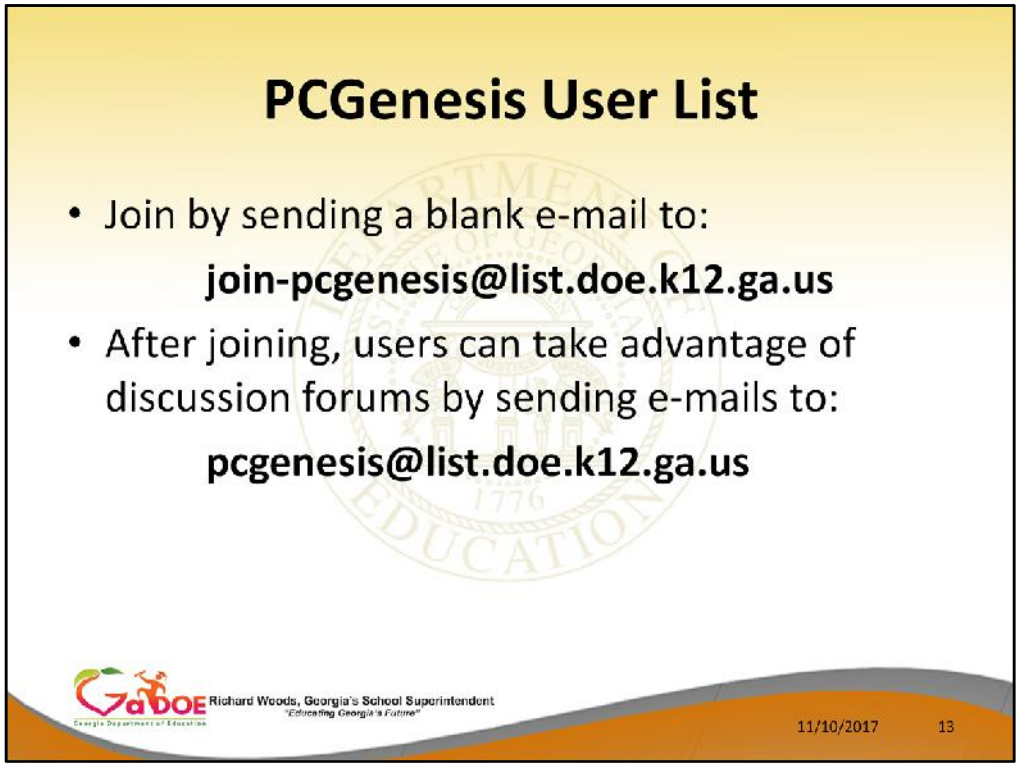
Any user involved with PCGenesis can join:

- Financial Directors
- Payroll Administrators
- IT Specialists



The e-mail list can be used to:

- Share ideas
- Discuss problems
- The list provides many more resources for gaining insight into PCGenesis operations and everyday issues

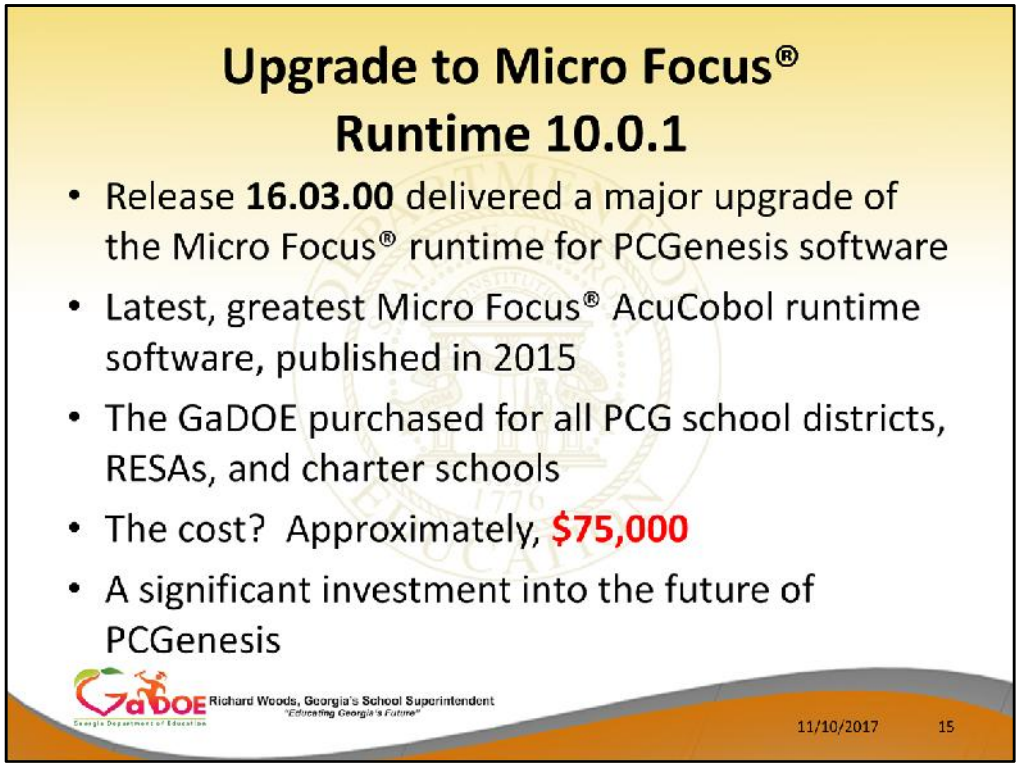


We include instructions for joining the PCGenesis User List when we send out PCGenesis releases, in the **Release Installation Instructions**.

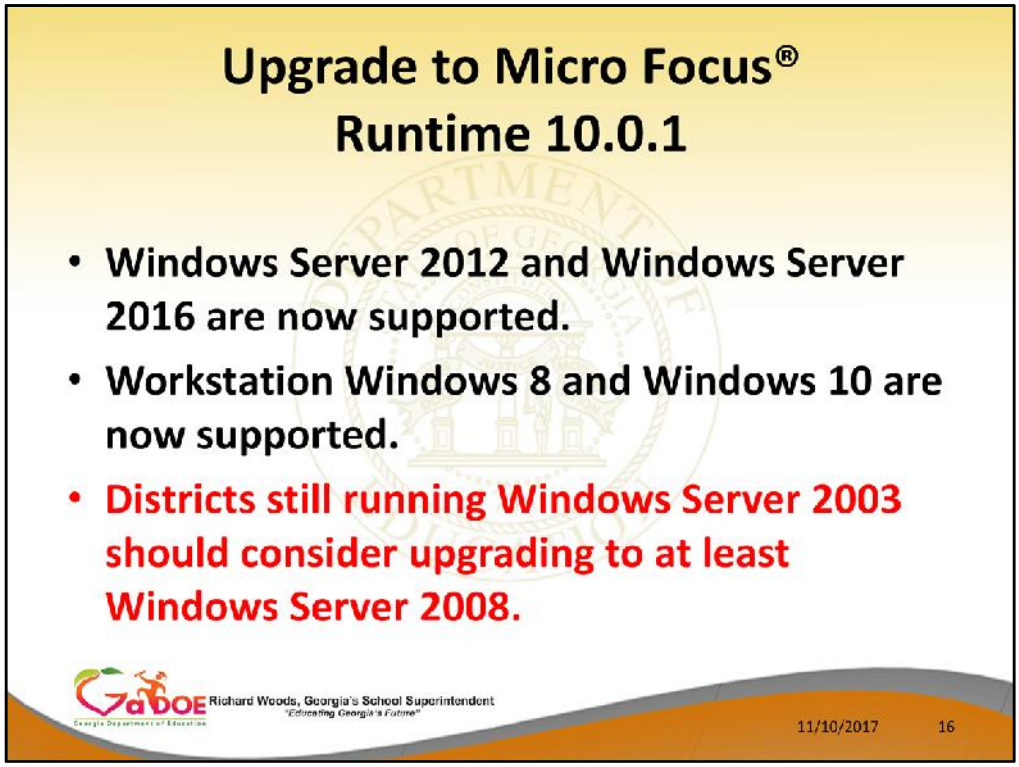
- Join by sending a blank e-mail to:
  join-pcgenesis@list.doe.k12.ga.us
- After joining, users can take advantage of discussion forums by sending e-mails to:
  pcgenesis@list.doe.k12.ga.us

Agenda

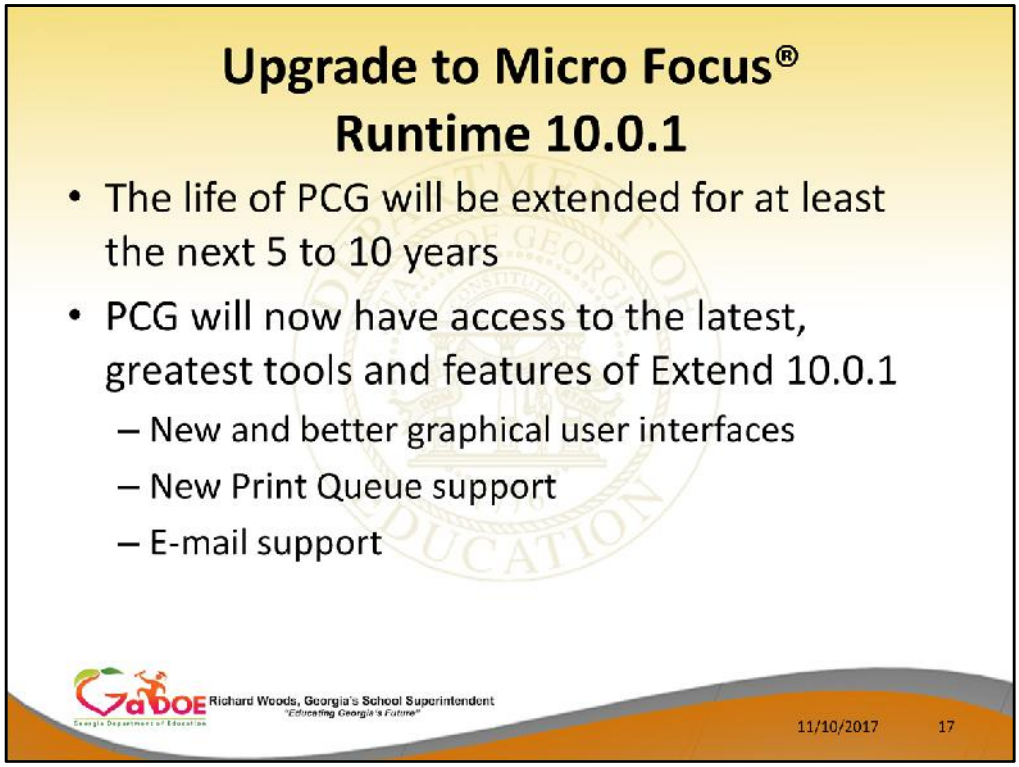
- Introduction
- **Upgrade to Micro Focus® Runtime 10.0.1**
- Upgrade of PCGenesis Print Queue
- What's Next
- Getting Ready for 2018 GHI
- User Input



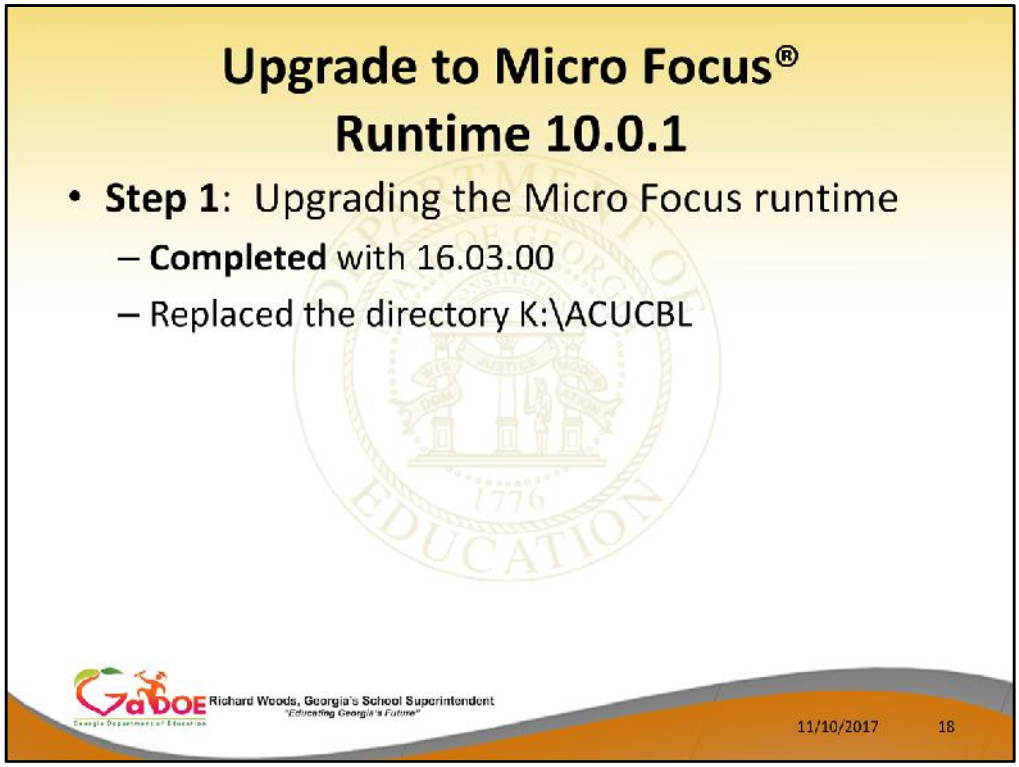
- Release 16.03.00 sent out on September 30th, 2016, delivered a major upgrade of the Micro Focus runtime system.
- Some background… The PCGenesis software is built using the Micro Focus COBOL compiler and runtime.
- We discovered that PCG would NOT run on Windows Server 2012 or Windows 10 without upgrading this runtime layer of software
- So, the Georgia Department of Education purchased Micro Focus Extend 10 AcuCbl runtime for all PCG school districts, RESAs and charter schools
- This represents an investment of $75,000 into the future of PCGenesis



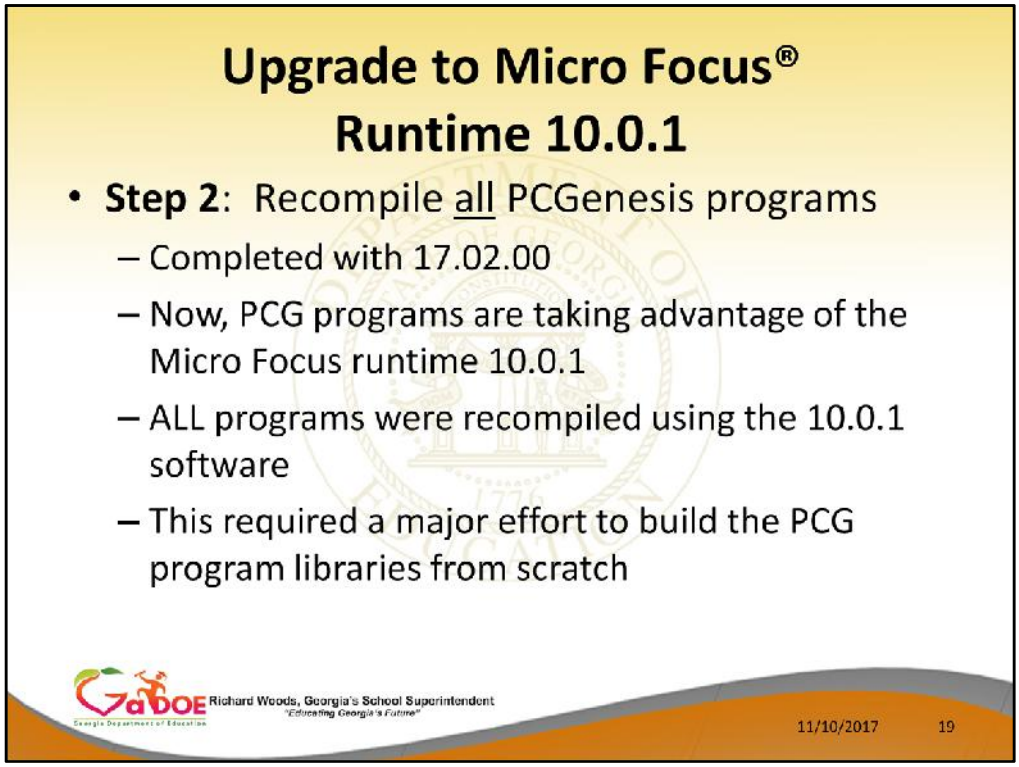
- Here's the good news….
- All of the latest, greatest Microsoft operating systems are now supported!
- There will be no problem upgrading workstations to Windows 10
- And, there will be no problems upgrading servers to Windows Server 2012 or Windows Server 2016
- We highly recommend that any districts still running Windows Server 2003 should consider upgrading their server!



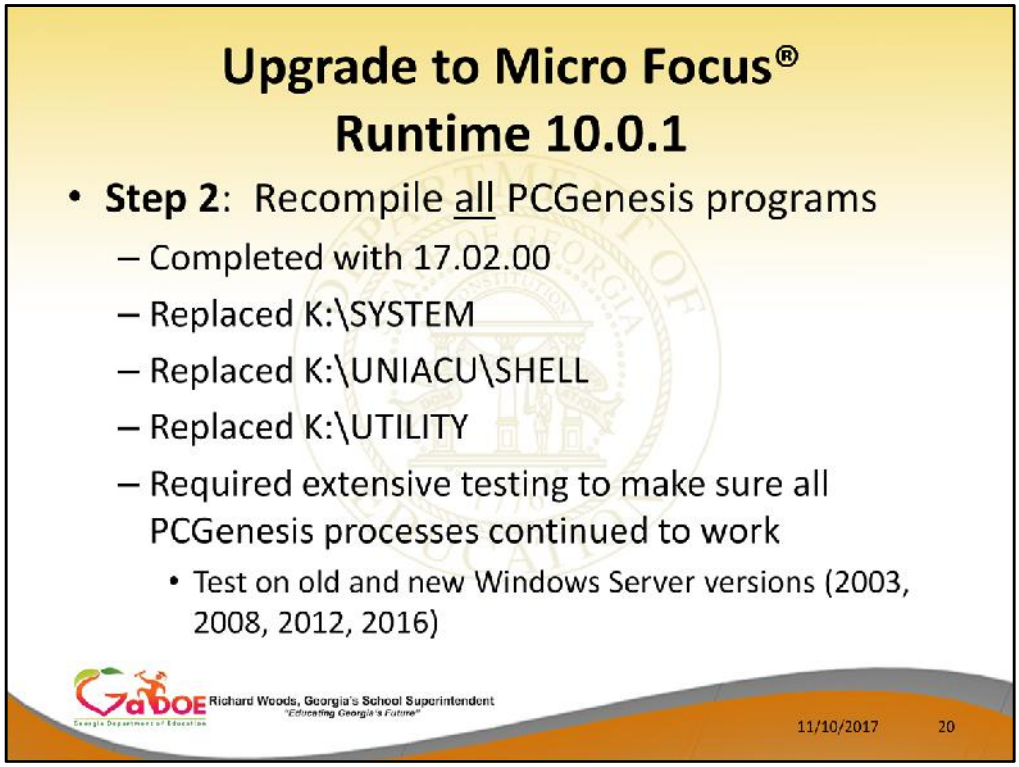
- More good news… The life of PCG will be extended for at least the next 5 to 10 years
- PCG will also have access to the latest, greatest tools and features available in Extend 10.0.1
    - New and better graphical user interfaces
    - New Print Queue support
    - E-mail support



- So, what is involved with the Micro Focus Runtime upgrade to Extend 10?
- Most of the updates took place "behind the scenes" and users might not be aware of the changes
- Even though you might not be aware of any benefits, these changes are BIG!
- **Step 1**, upgrading the runtime software was completed with Release 16.03.00 which was sent out on September 30th, 2016
- This step required replacing the directory K:\ACUCBL



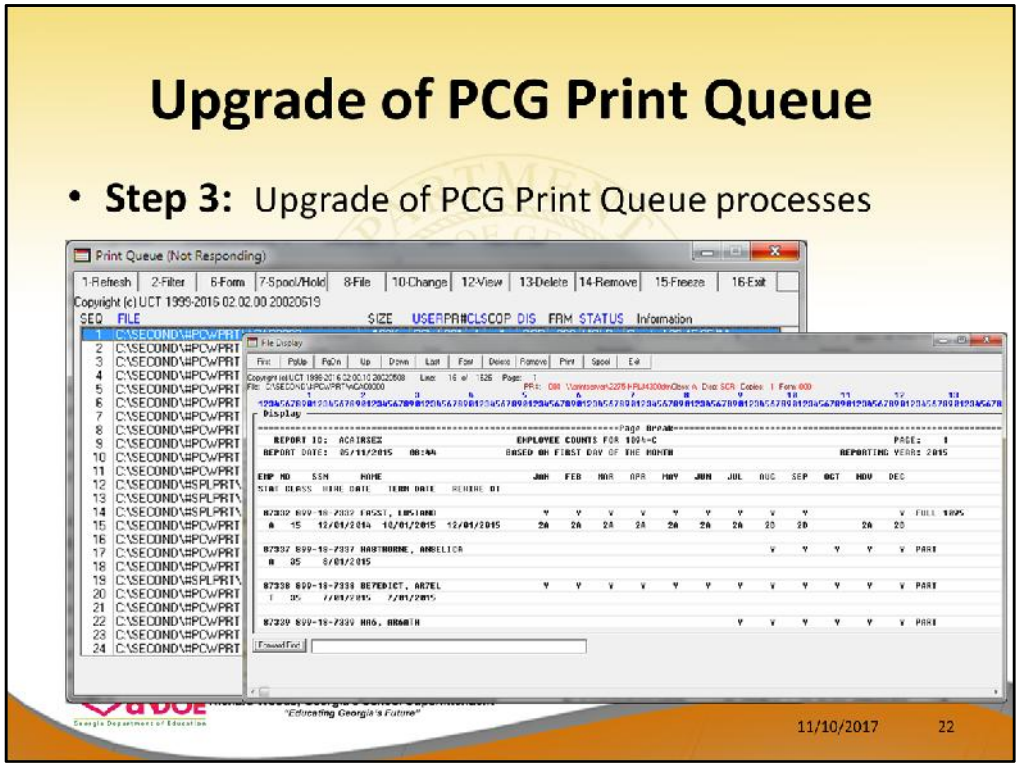
- Most of the updates took place “behind the scenes” and users might not be aware of the changes
- **Step 2** will require that we recompile ALL PCG programs
- ALL programs must be recompiled using the Micro Focus Extend 10 software
- This step was completed with release 17.02.00 in June 2017
- This required a major effort to build the PCG program libraries from scratch



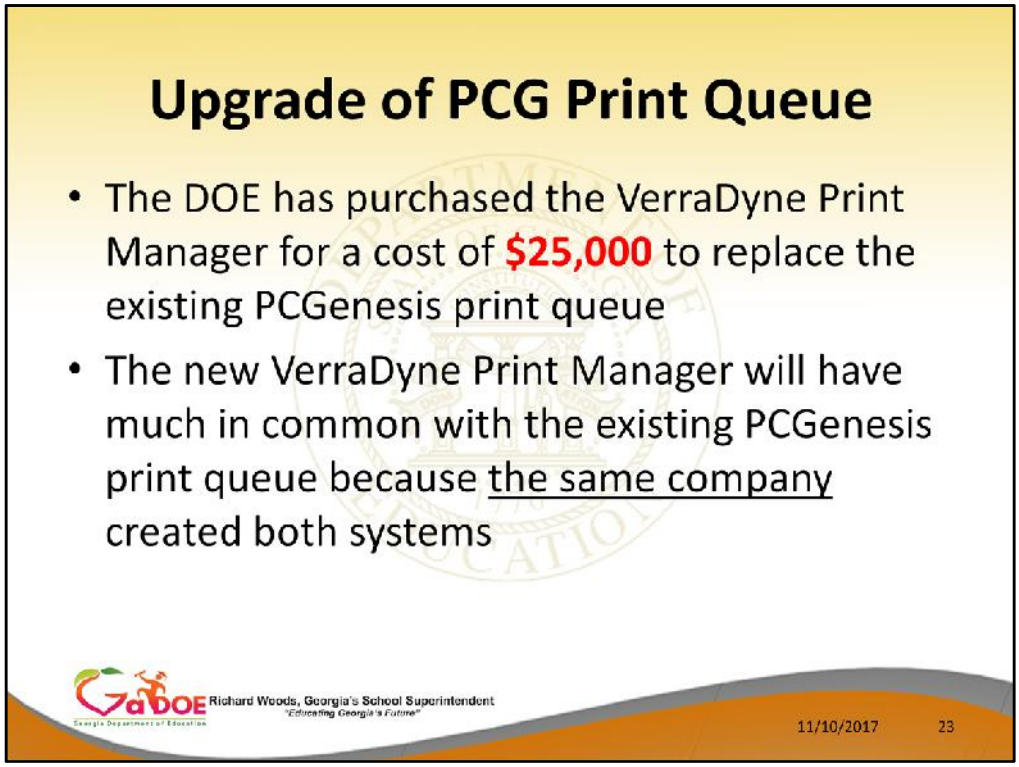
- Most of the updates took place “behind the scenes” and users might not be aware of the changes
- Delivery of this step was **June of 2017**, in release **17.02.00**
- The recompile meant that all modules in **K:\SYSTEM** and **K:\UNIACU\SHELL** and **K:\UTILITY** were replaced
- Replacing these directories required extensive QA testing to make sure all PCG processes continue to work
- We tested on all old and new Windows Server operating system versions

Agenda

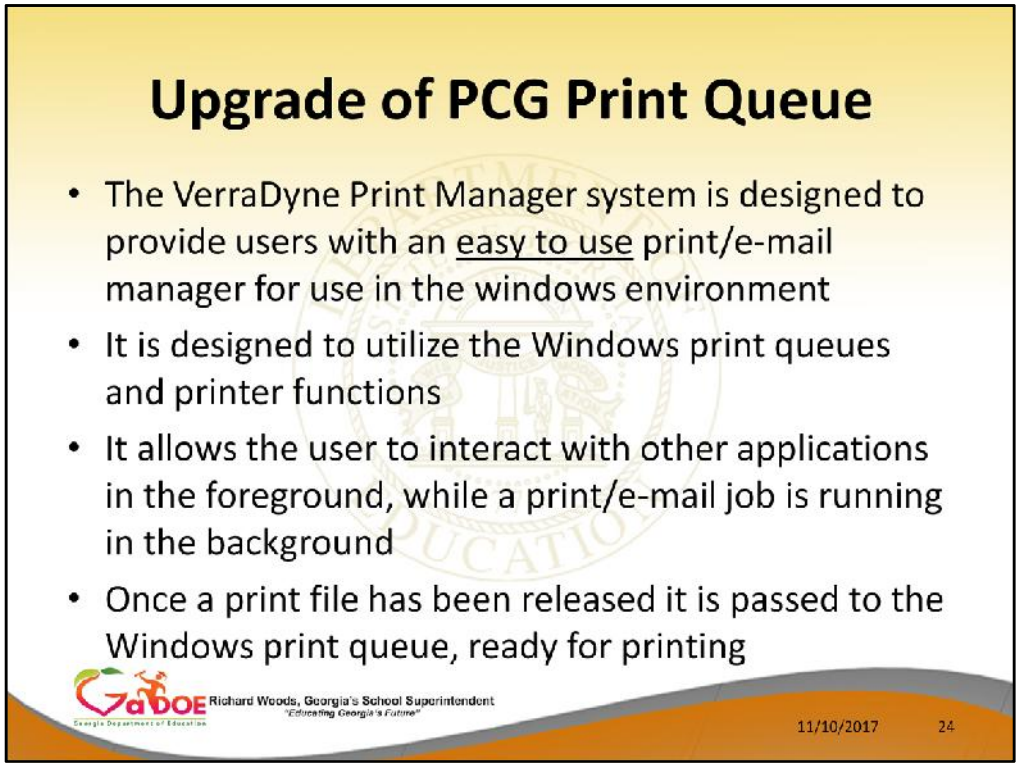
- Introduction
- Upgrade to Micro Focus® Runtime 10.0.1
- **Upgrade of PCGenesis Print Queue**
- What's Next
- Getting Ready for 2018 GHI
- User Input



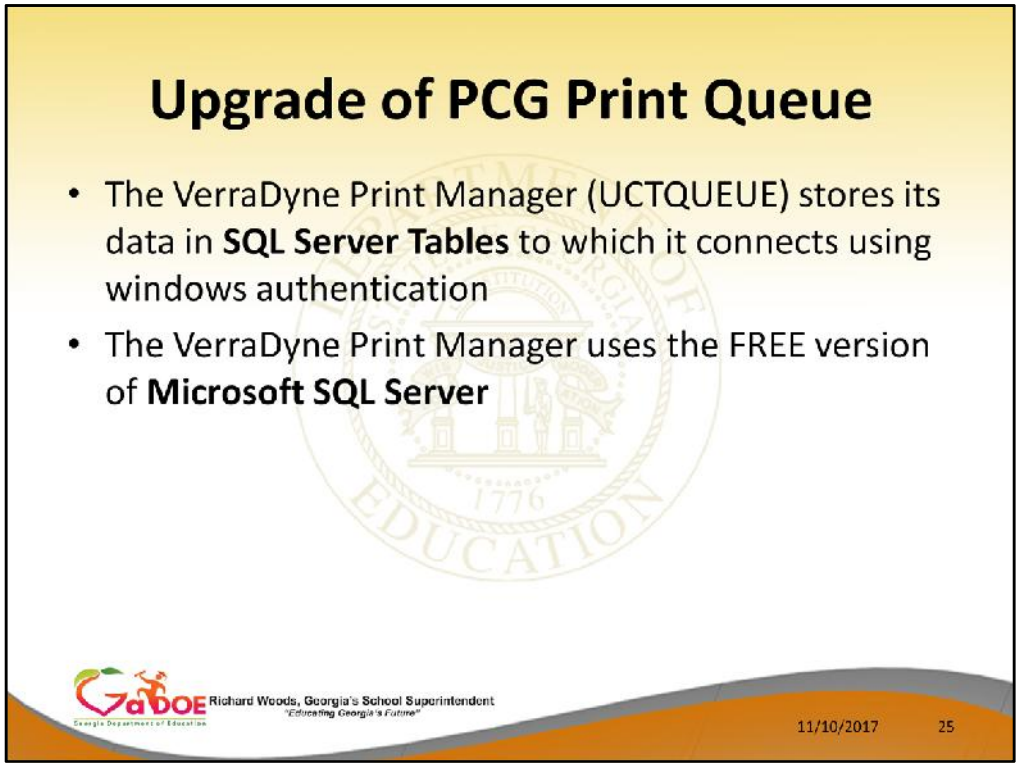
- The DOE is happy to announce that we will be rolling out a major upgrade of the PCGenesis Print Queue!
- Recently, school districts upgrading to Windows Server 2012 and Windows Server 2016 have experienced problems using the old version of the print queue in printing their reports.
- Specifically, quite a few sites have problems with the reports printing in portrait and with a large font instead of landscape.
- Since the DOE does not own the source code for the existing print queue, we can't correct the issues.



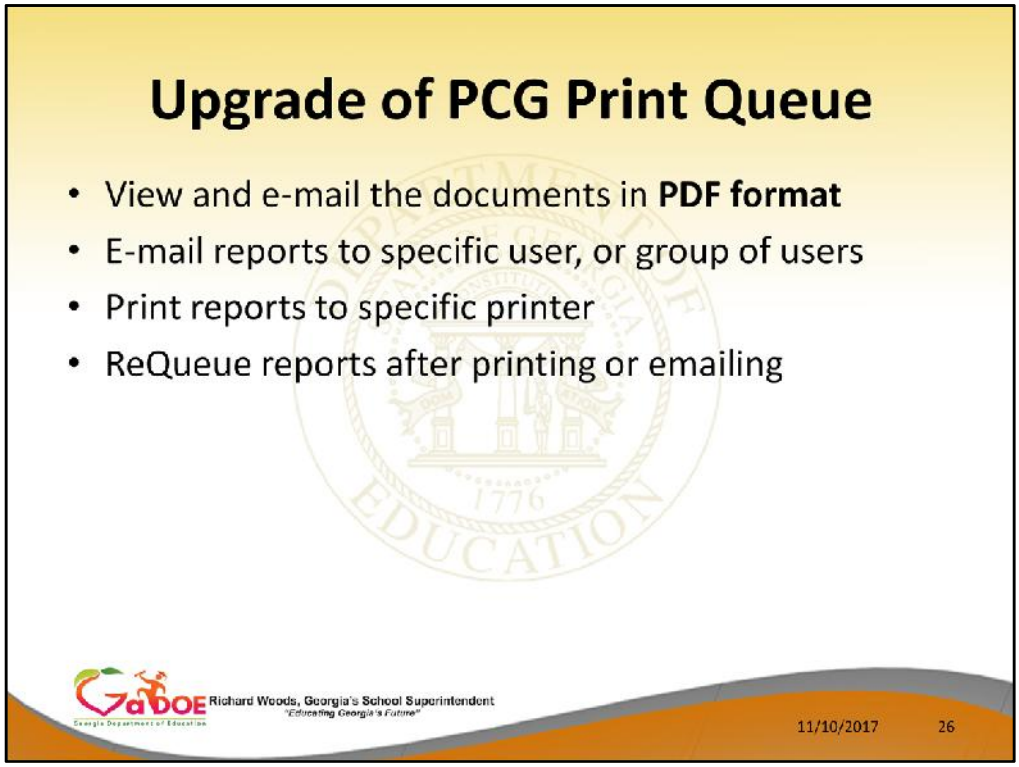
- The PCGenesis development team will upgrade the PCG Print Queue processes
- The DOE has purchased the VerraDyne Print Manager for a cost of $25,000 to replace the existing PCGenesis print queue
- The new VerraDyne Print Manager will have much in common with the existing PCGenesis print queue because the same company created both systems



- The VerraDyne Print Manager system is designed to provide users with an easy to use print/e-mail manager for use in the windows environment
- Just like our existing PCGenesis print queue, it is designed to utilize the Windows print queues and printer functions
- Just like our existing PCGenesis print queue, it allows the user to interact with other applications in the foreground, while a print/e-mail job is running in the background
- Once a print file has been released it is passed to the Windows print queue, ready for printing

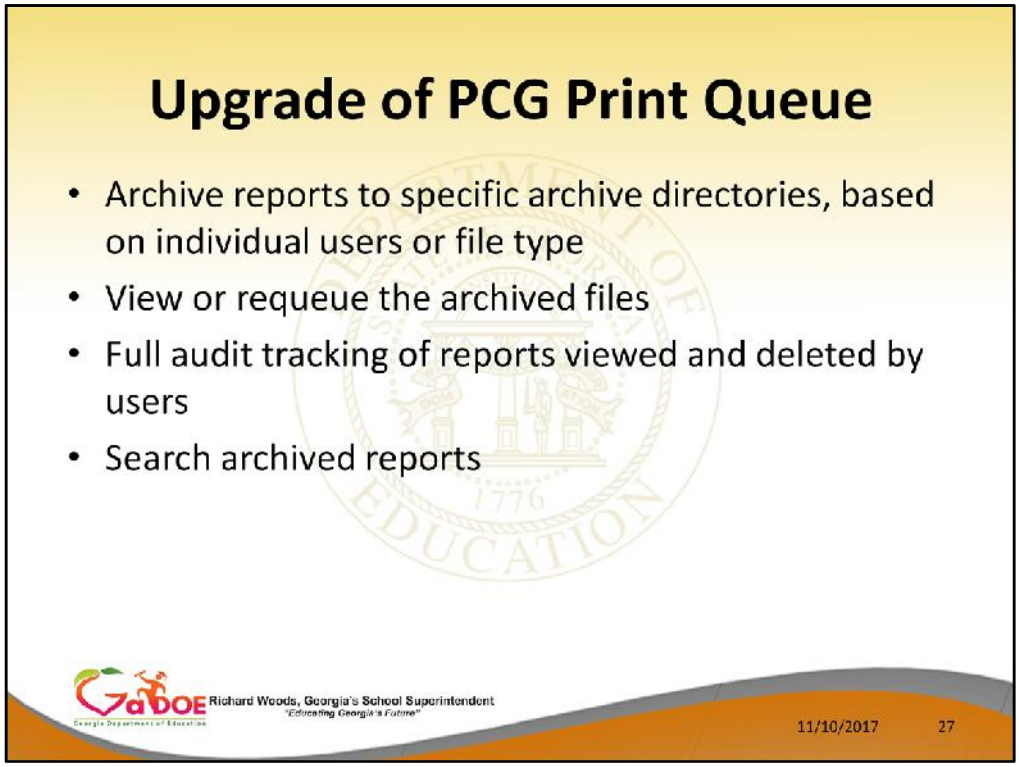


- Unlike our existing PCGenesis print queue, the VerraDyne Print Manager (UCTQUEUE) stores its data in **SQL Server Tables** to which it connects using windows authentication
- The VerraDyne Print Manager uses the FREE version of **Microsoft SQL Server**



Some of the features of the new VerraDyne Print Manager system:

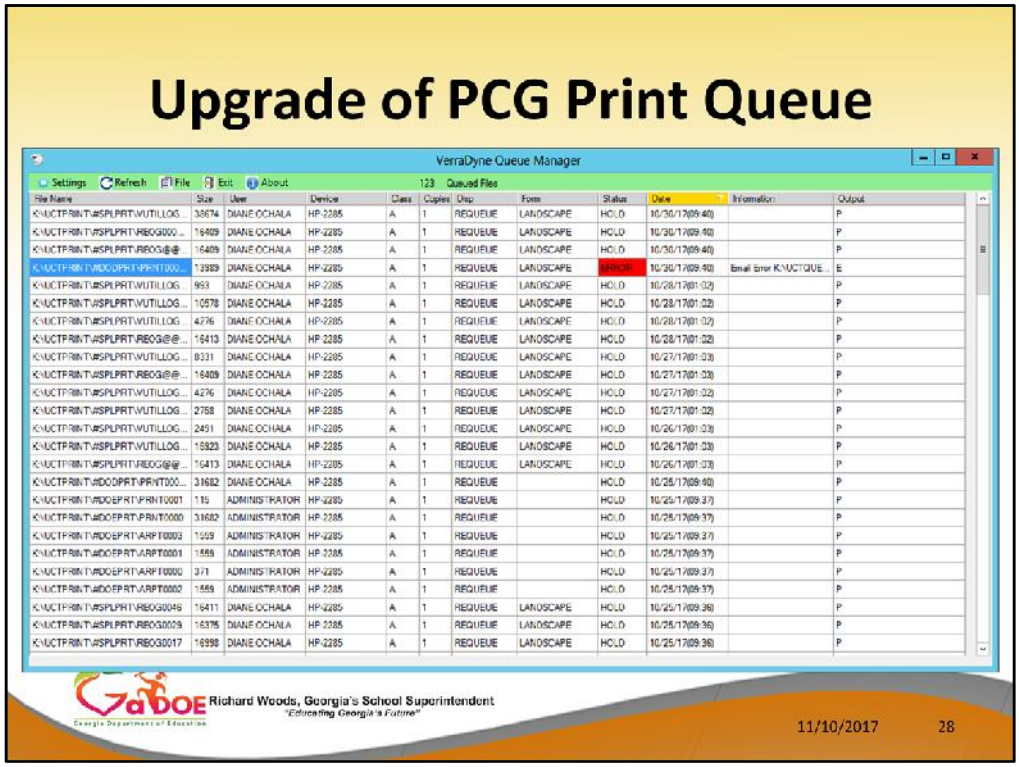
- You will be able to view and e-mail the documents in **PDF format**
- You will be able to e-mail reports to specific user, or group of users
- You will be able to print reports to specific printer
- Just like our existing PCGenesis print queue, you will be able to re-queue reports after printing or emailing



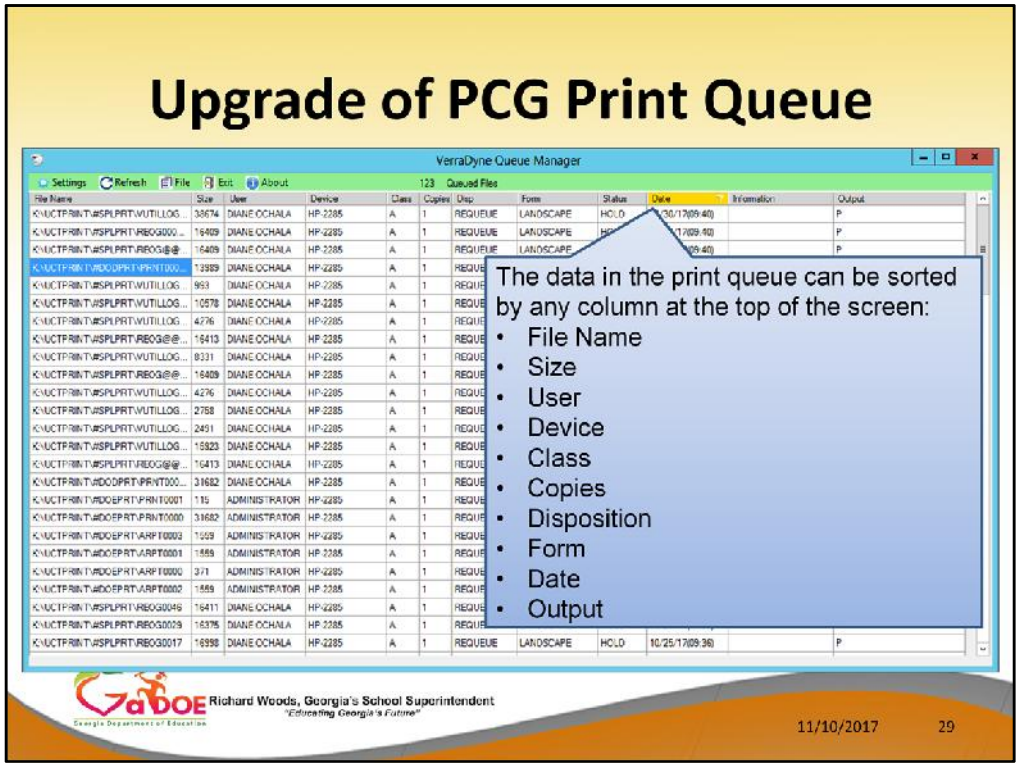
Some of the features of the new VerraDyne Print Manager system:

- You will be able to archive reports to specific archive directories, based on individual users or file type
- You will be able to view or requeue the archived files
- Full audit tracking of reports viewed and deleted by users will be available
- You will be able to search archived reports using specific parameters

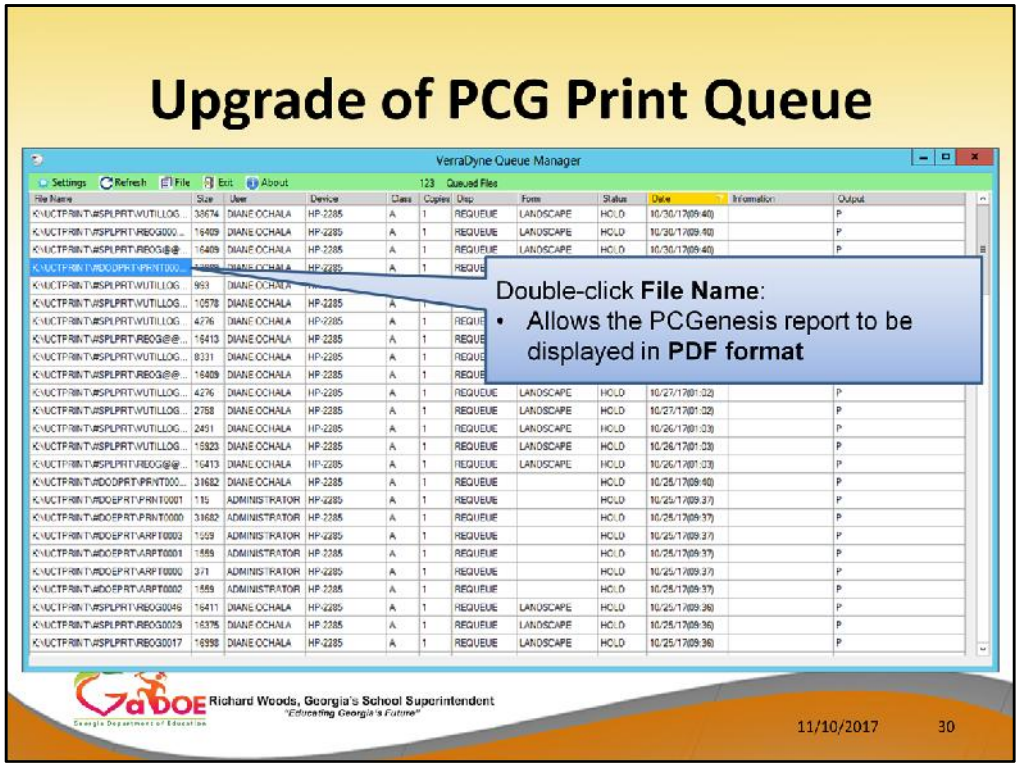
Upgrade of PCG Print Queue



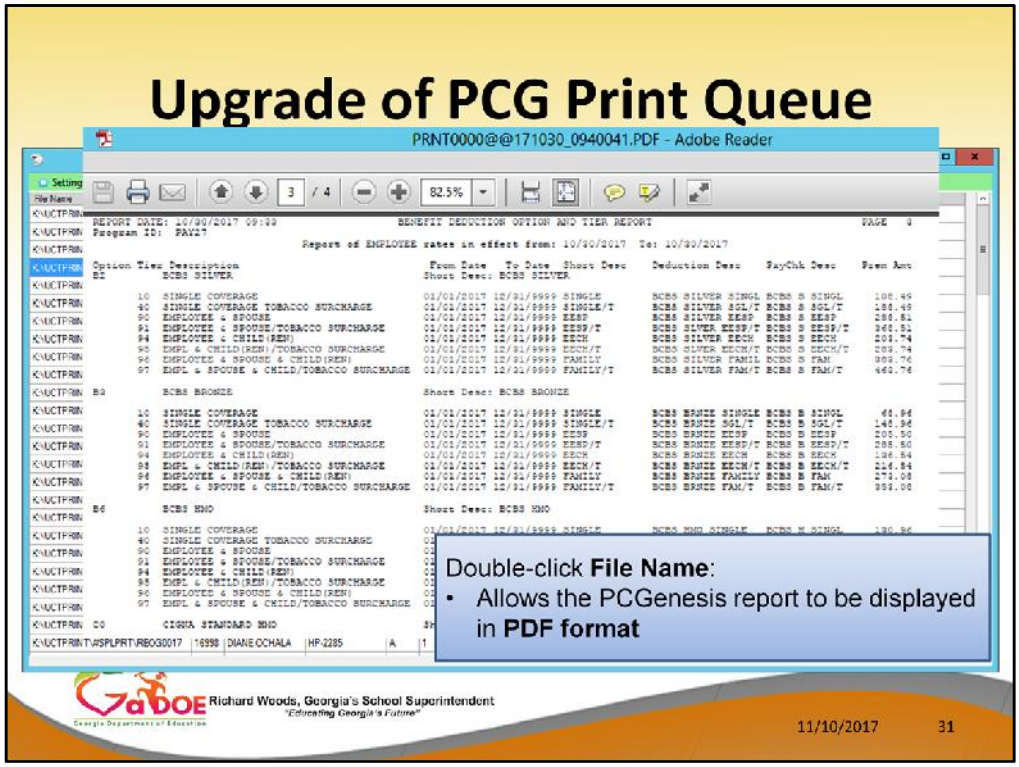
- This is the VerraDyne Print Manager system
- It is very similar to the old PCGenesis Print Queue



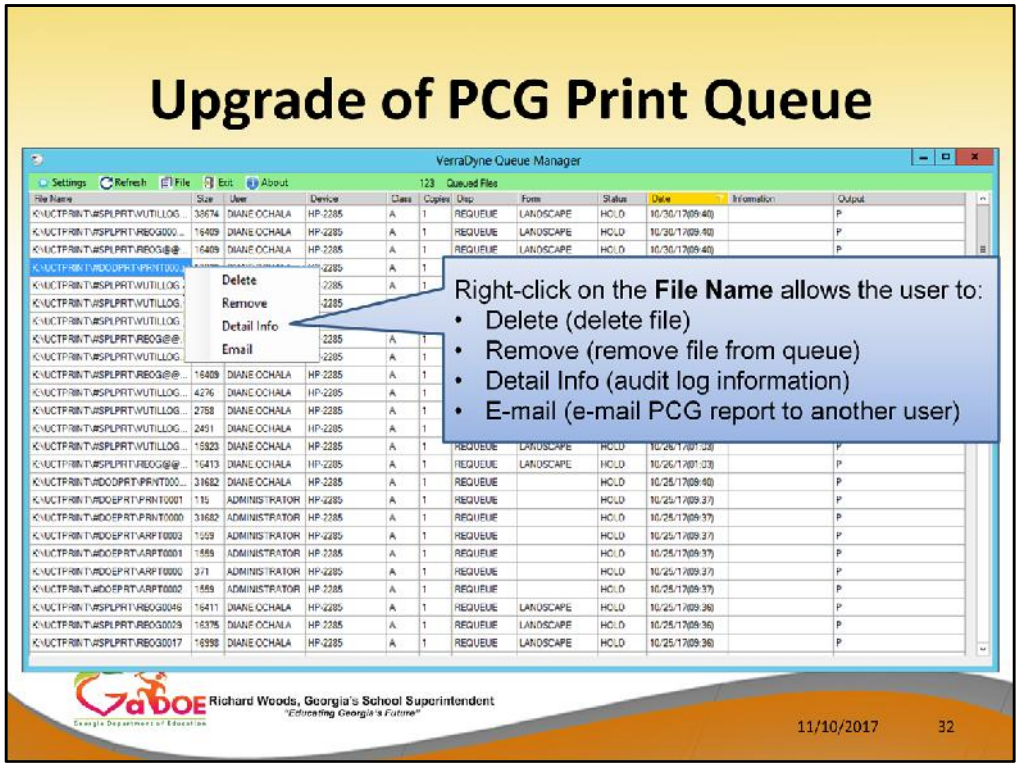
- This is the VerraDyne Print Manager system
- The data in the print queue can be sorted by any column at the top of the screen:
  - File Name, Size, User, Device, Class, Copies, Disposition, Form, Date, Output



- This is the VerraDyne Print Manager system
- Double-click **File Name**: Allows the PCGenesis report to be displayed in **PDF format**



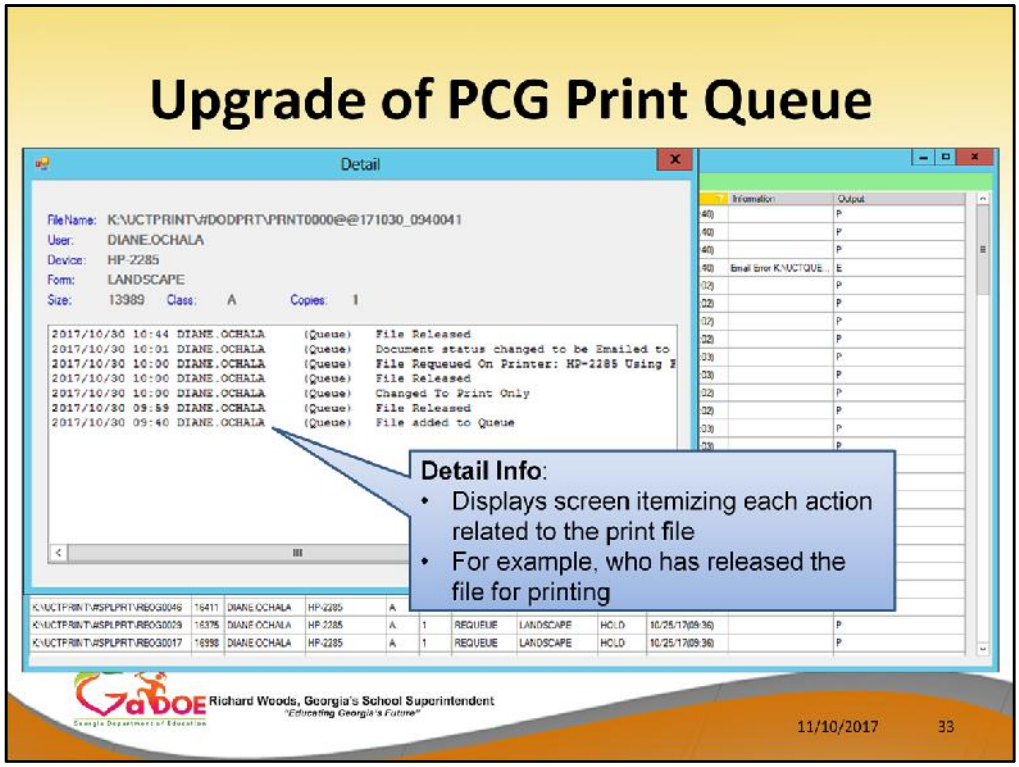
- This is the VerraDyne Print Manager system
- Double-click **File Name**: Allows the PCGenesis report to be displayed in **PDF format**



This is the VerraDyne Print Manager system

Right-click on the **File Name** allows the user to:

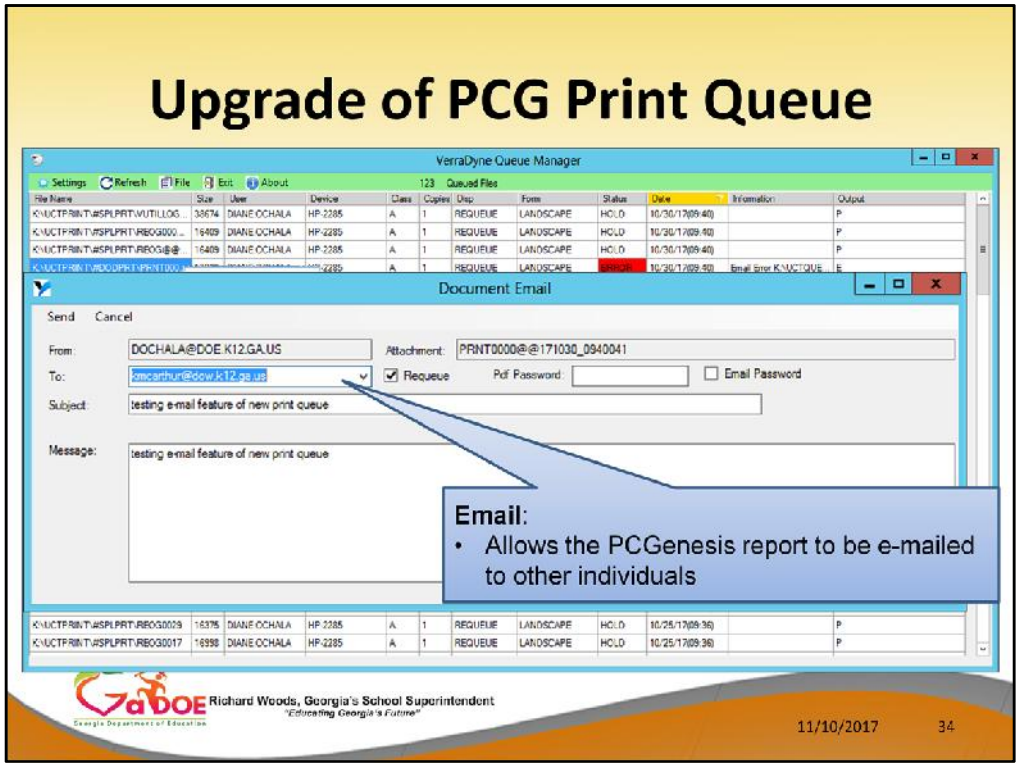
- Delete (delete file)
- Remove (remove file from queue)
- Detail Info (audit log information)
- E-mail (e-mail PCG report to another user)



This is the VerraDyne Print Manager system

Detail Info:

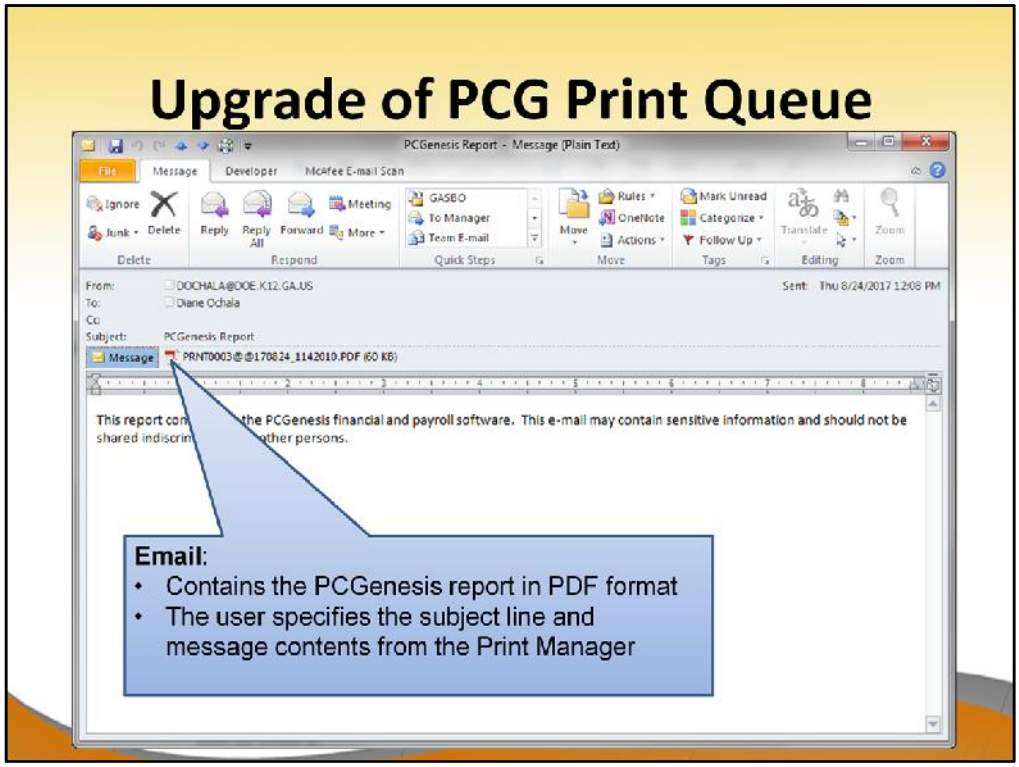
- The Detail Info displays a screen which itemizes each action related to the print file
- For example, who has released the file for printing



This is the VerraDyne Print Manager system

Email:

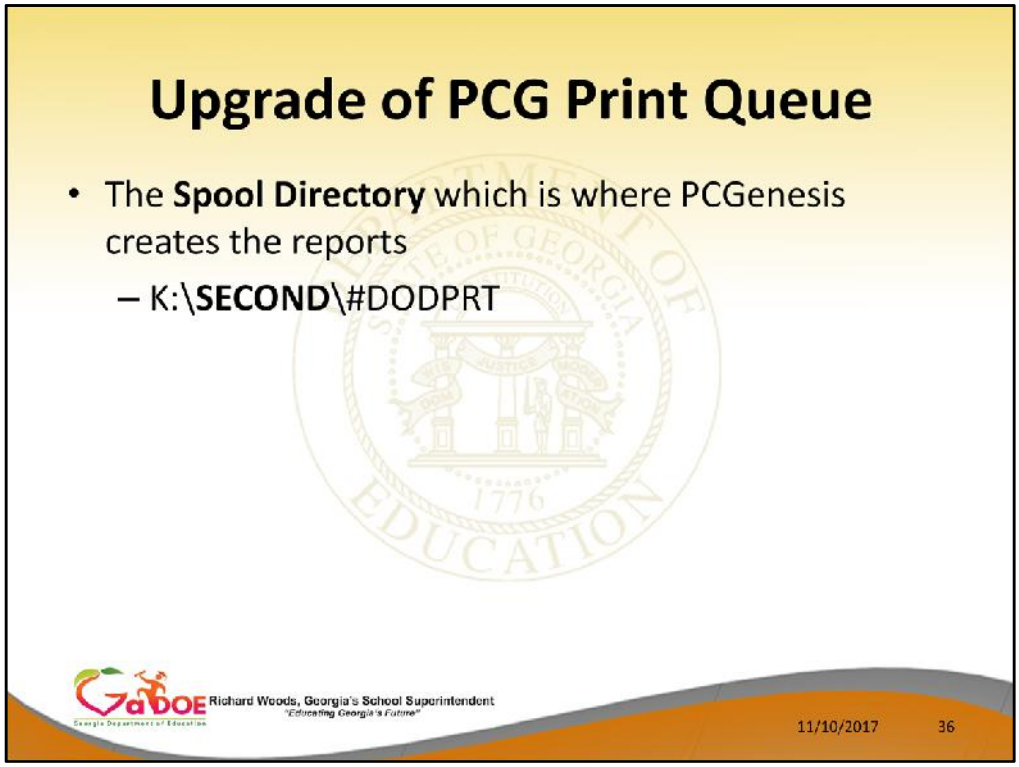
- Allows the PCGenesis report to be e-mailed to other individuals



This is the VerraDyne Print Manager system

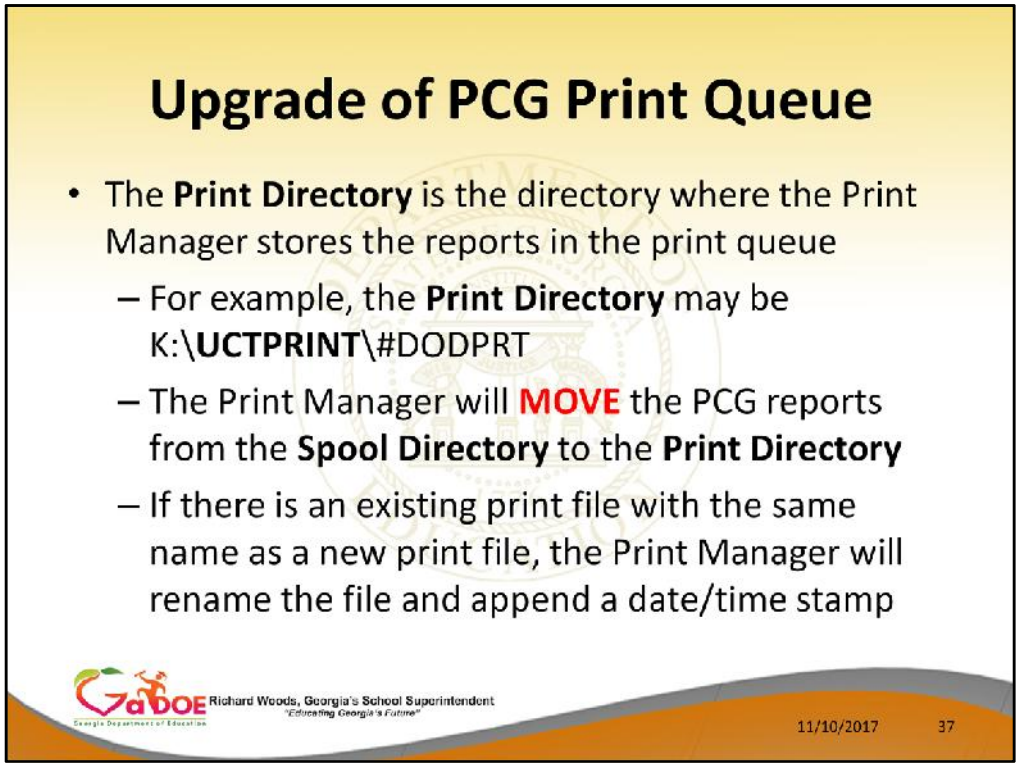
Email:

- This screen shows an e-mail generated by the VerraDyne Print Manager
- The e-mail contains the PCGenesis report in PDF format
- The user specifies the subject line and message contents from the Print Manager



This is the VerraDyne Print Manager system
The **Spool Directory** which is where PCGenesis creates the reports

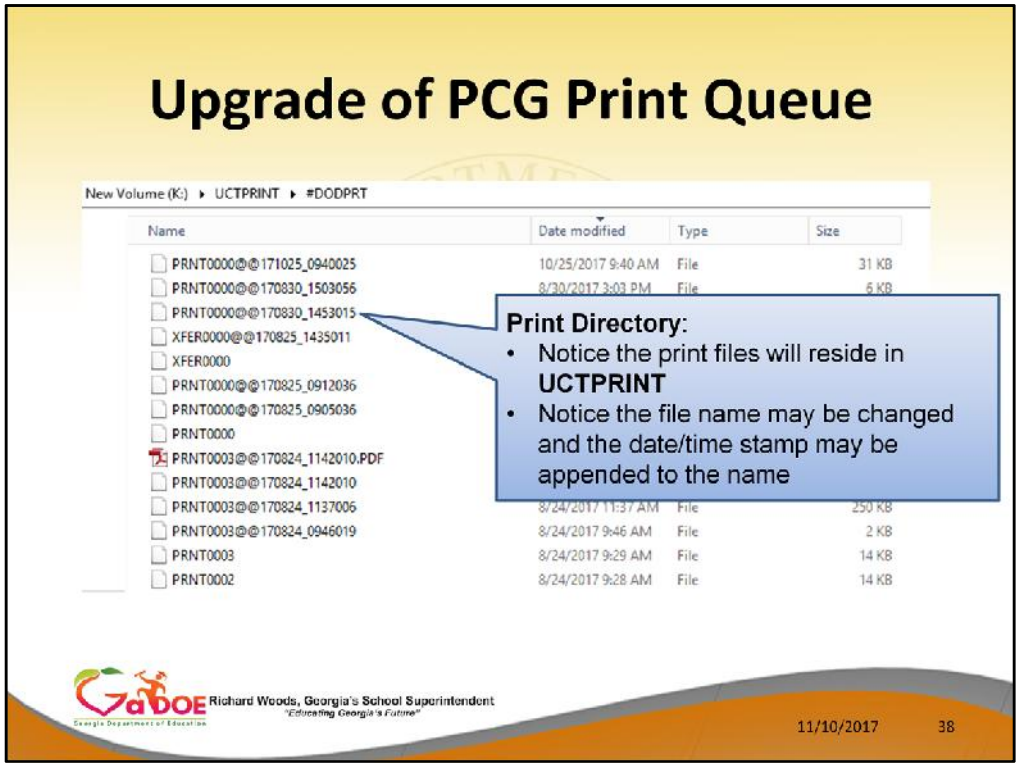
K:**SECOND**\#DODPRT



This is the VerraDyne Print Manager system

The **Print Directory** is the directory where the Print Manager stores the reports in the print queue

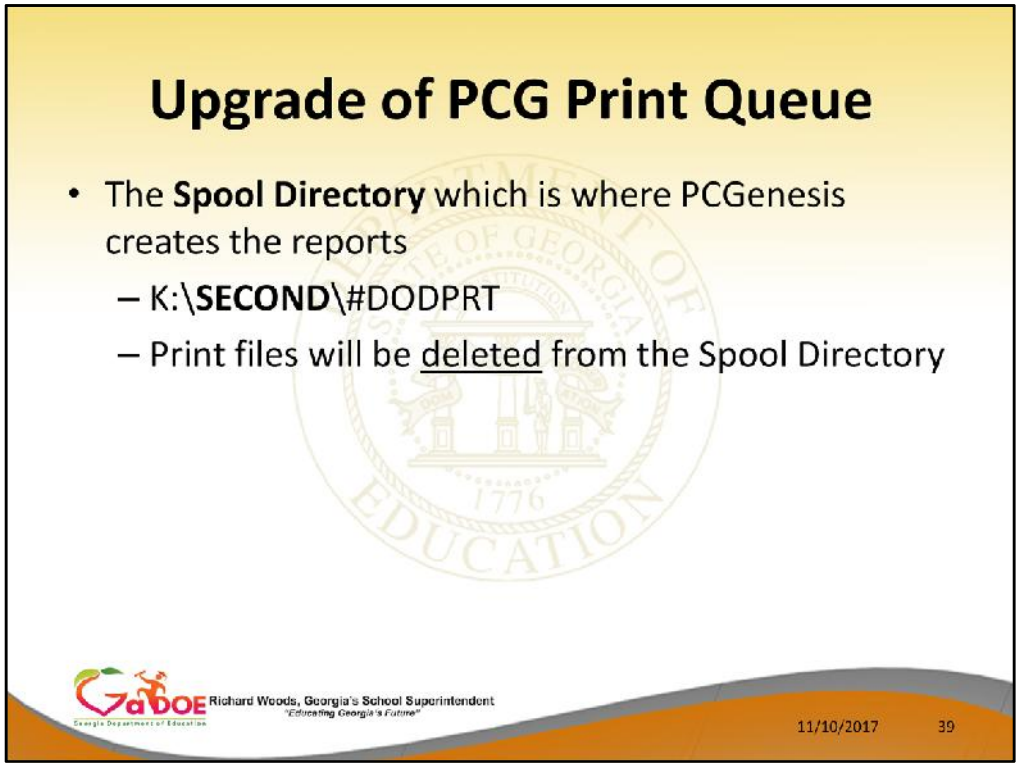
- For example, the **Print Directory** may be K:**UCTPRINT**\#DODPRT
- The Print Manager will **MOVE** the PCG reports from the **Spool Directory** to the **Print Directory**
- If there is an existing print file with the same name as a new print file, the Print Manager will rename the file and append a date/time stamp



This is the VerraDyne Print Manager system

The **Print Directory** is the directory where the Print Manager stores the reports in the print queue

- For example, the **Print Directory** may be K:**UCTPRINT**\#DODPRT
- Notice the print files will reside in **UCTPRINT**
- The Print Manager will **MOVE** the PCG reports from the **Spool Directory** to the **Print Directory**
- If there is an existing print file with the same name as a new print file, the Print Manager will rename the file and append a date/time stamp
- Notice the file name may be changed and the date/time stamp may be appended to the name

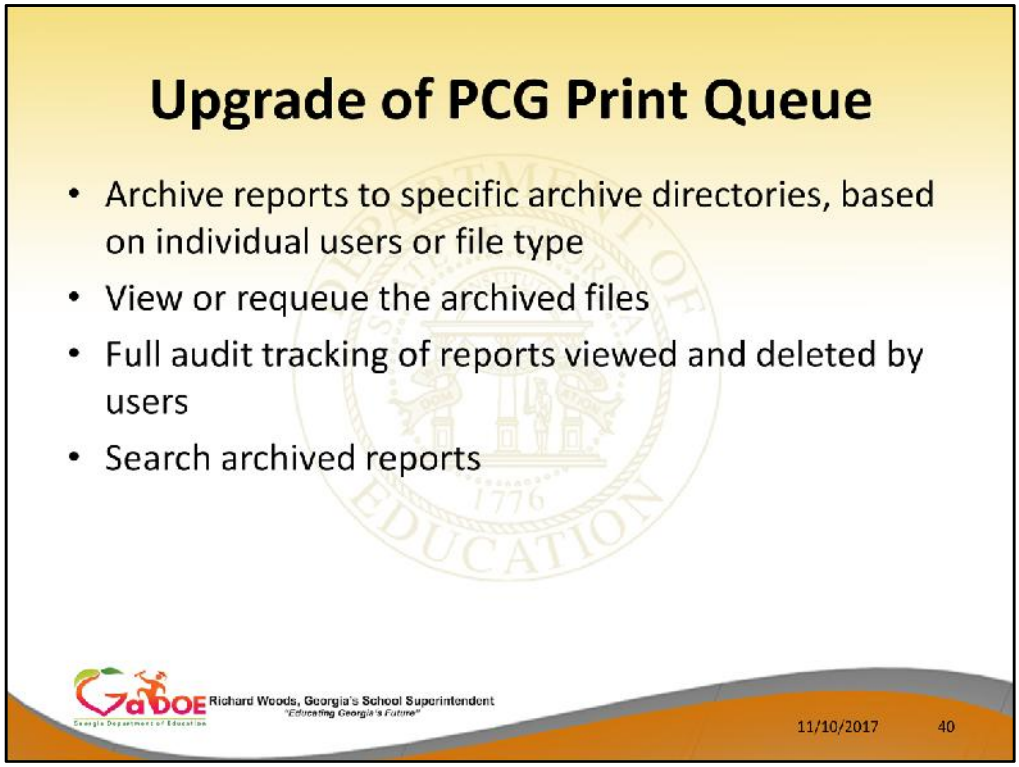


This is the VerraDyne Print Manager system

The **Spool Directory** which is where PCGenesis creates the reports

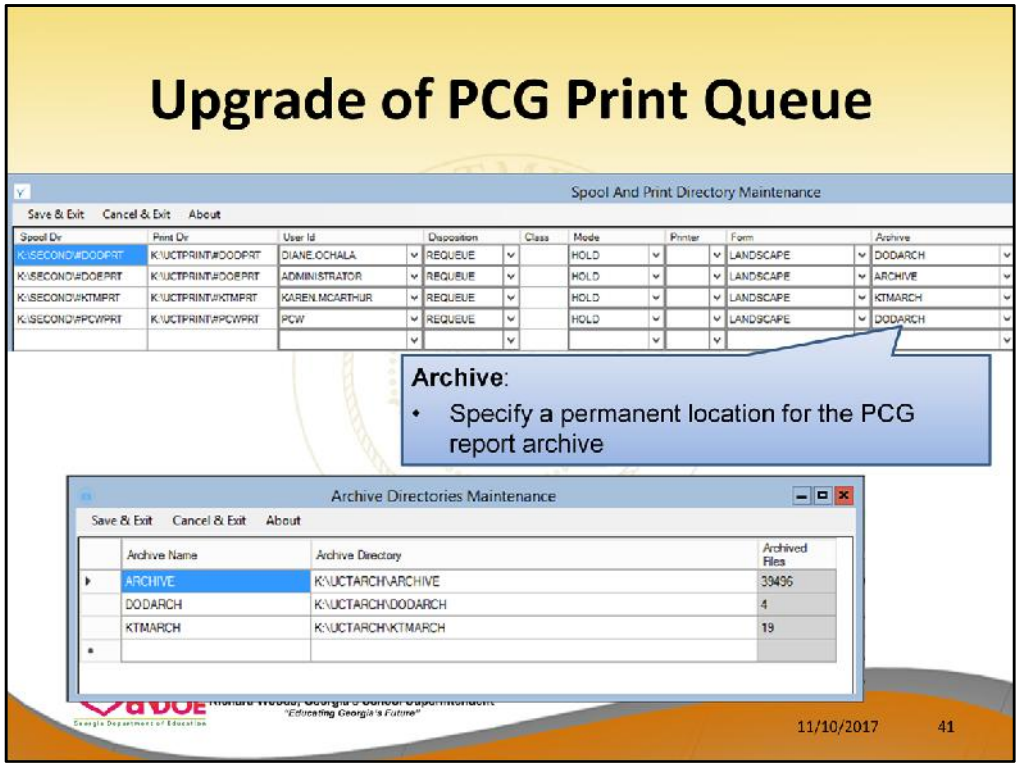
K:**SECOND**\#DODPRT

Print files will be deleted from the Spool Directory



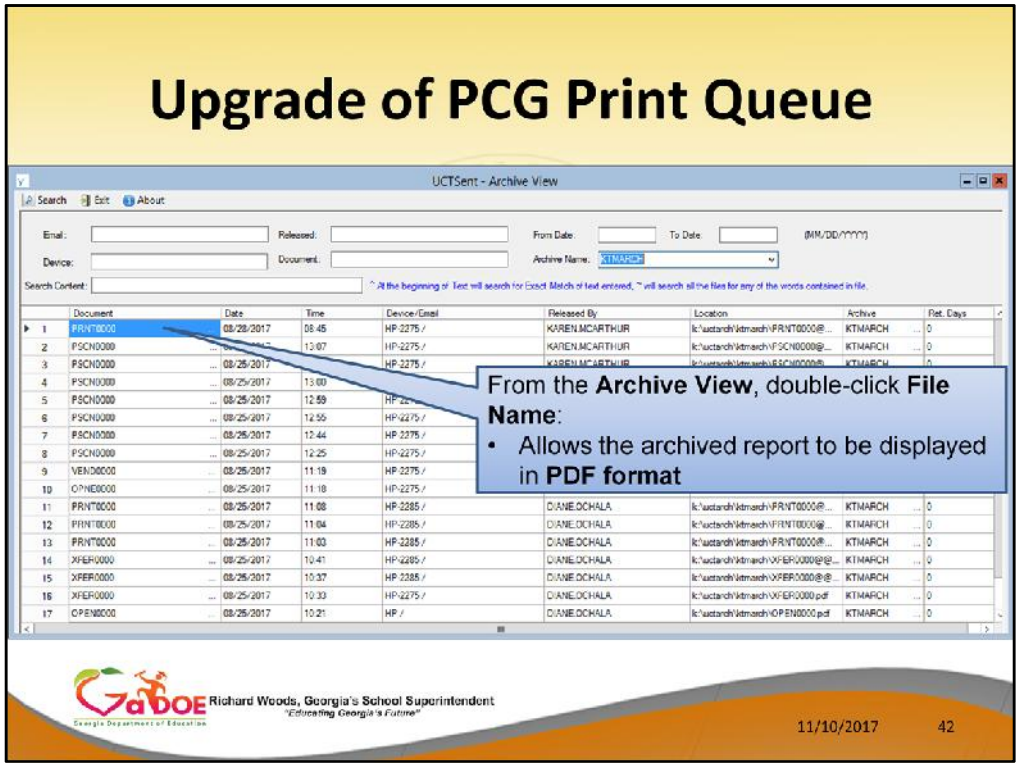
Some of the features of the new VerraDyne Print Manager system:

- You will be able to archive reports to specific archive directories, based on individual users or file type
- You will be able to view or requeue the archived files
- Full audit tracking of reports viewed and deleted by users will be available
- You will be able to search archived reports using specific parameters

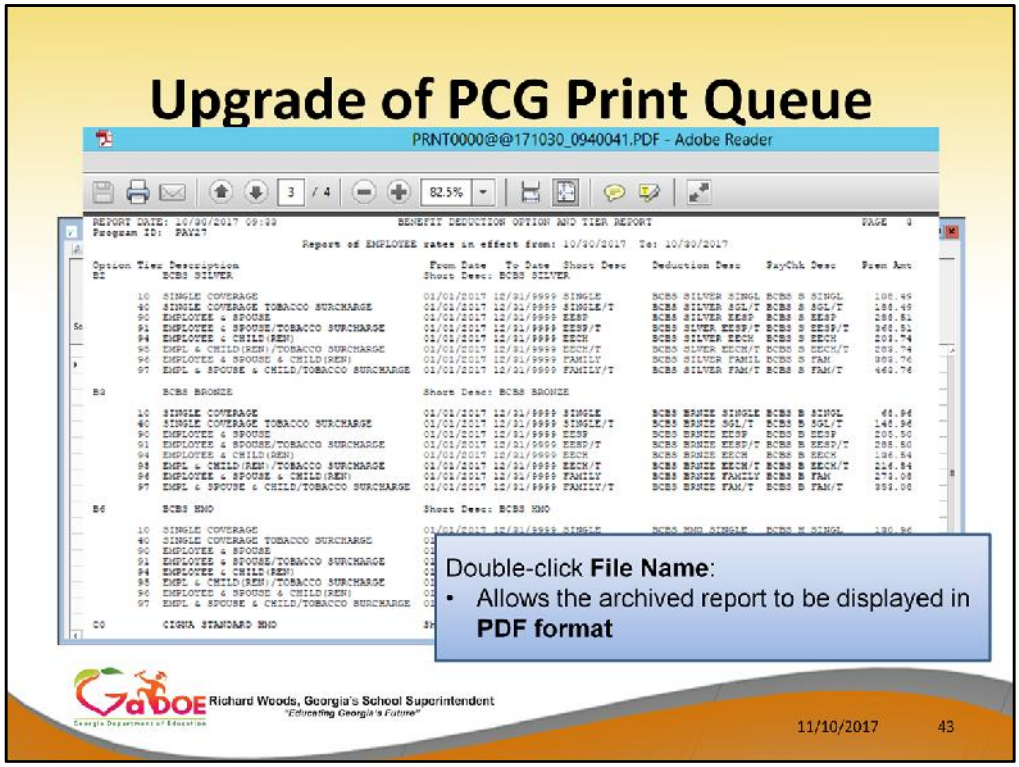


Some of the features of the new VerraDyne Print Manager system:

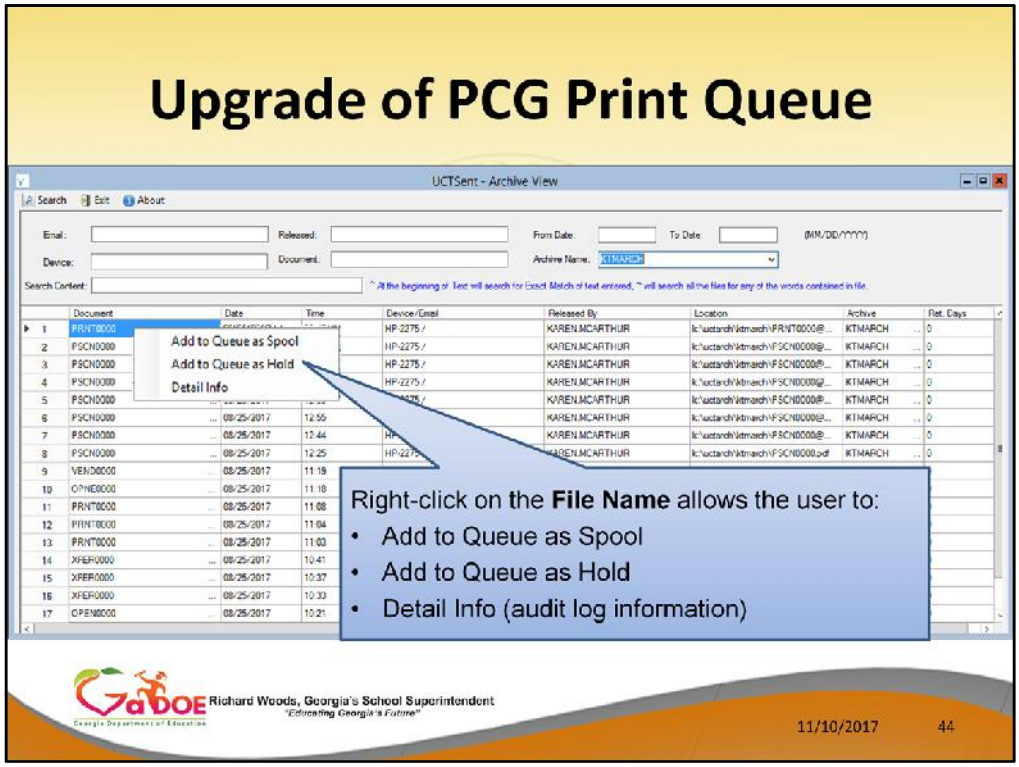
- You will be able to archive reports to specific archive directories, based on individual users or file type
- You will be able to specify a permanent location for the PCG report archive.
- In this example, separate archives have been set up for different users



From the **Archive View**, double-click **File Name**: The archived report to be displayed in **PDF format**



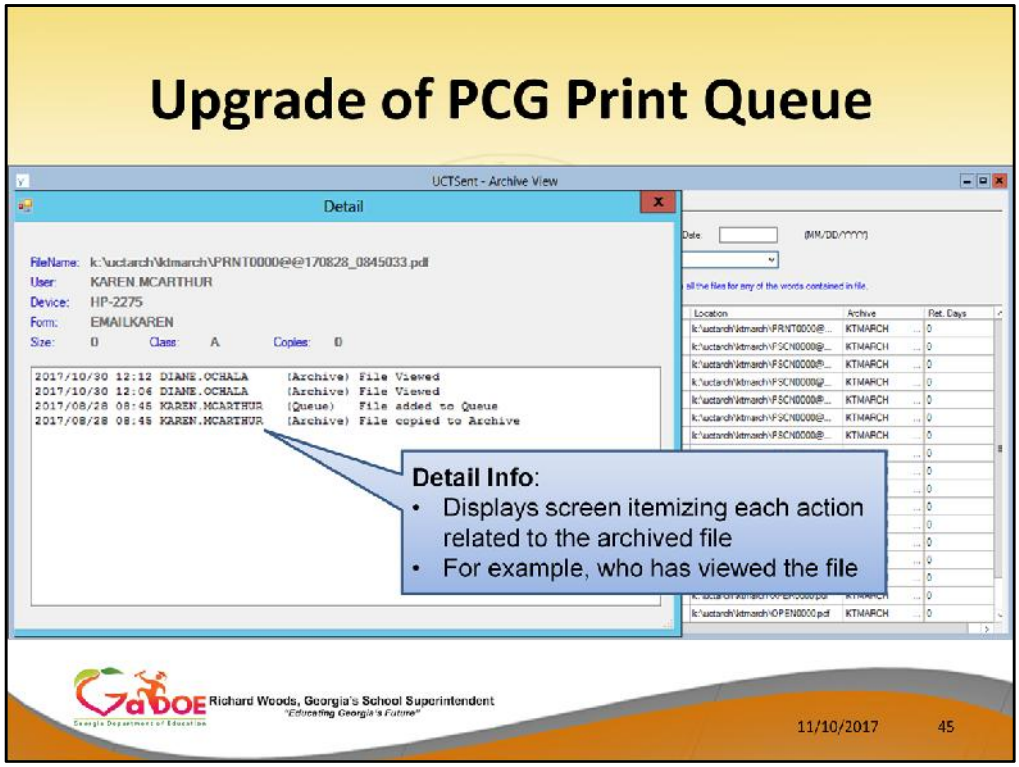
From the **Archive View**, double-click **File Name**: The archived report to be displayed in **PDF format**



This is Archive View

Right-click on the **File Name** allows the user to:

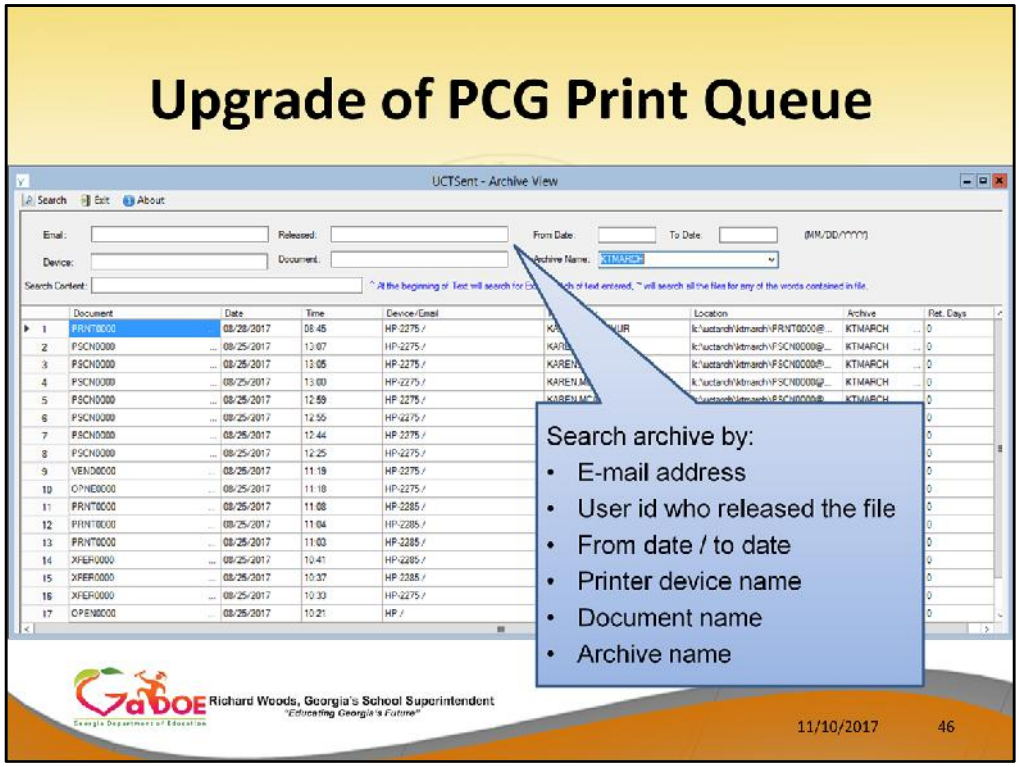
- Add the archived file to Queue as **Spool**
- Add the archived file to Queue as **Hold**
- Display the Detail Info for the archived file (audit log information)



This is Archive View

Detail Info:

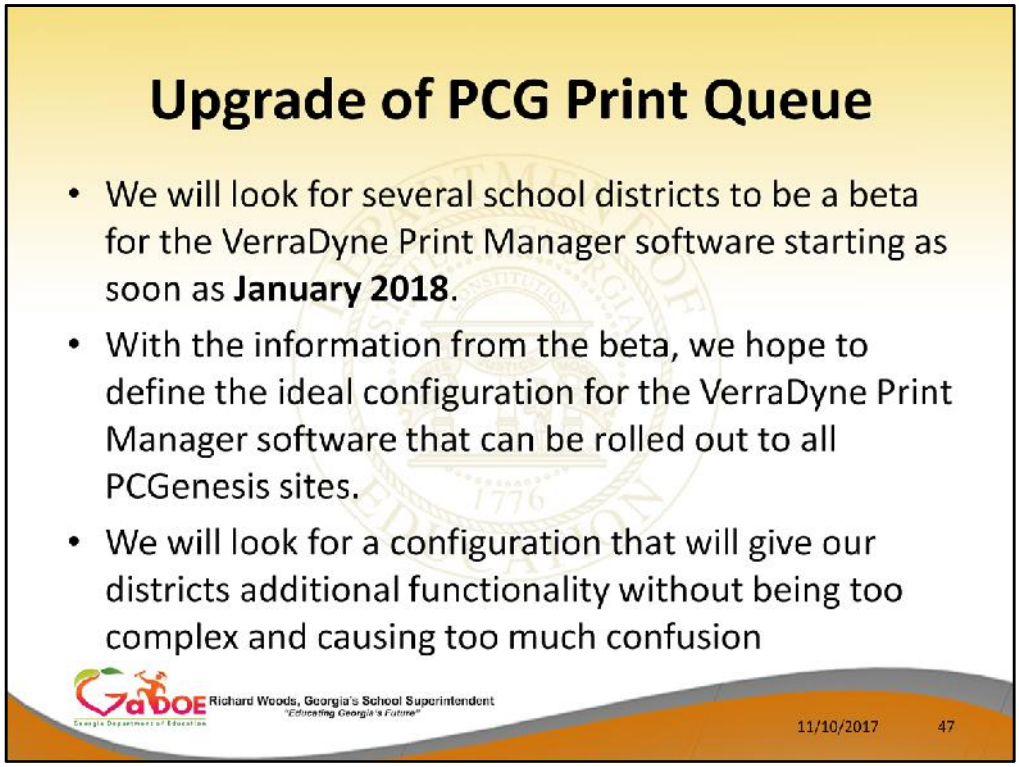
- The Detail Info displays a screen which itemizes each action related to the archived file
- For example, who has viewed the file in the archive



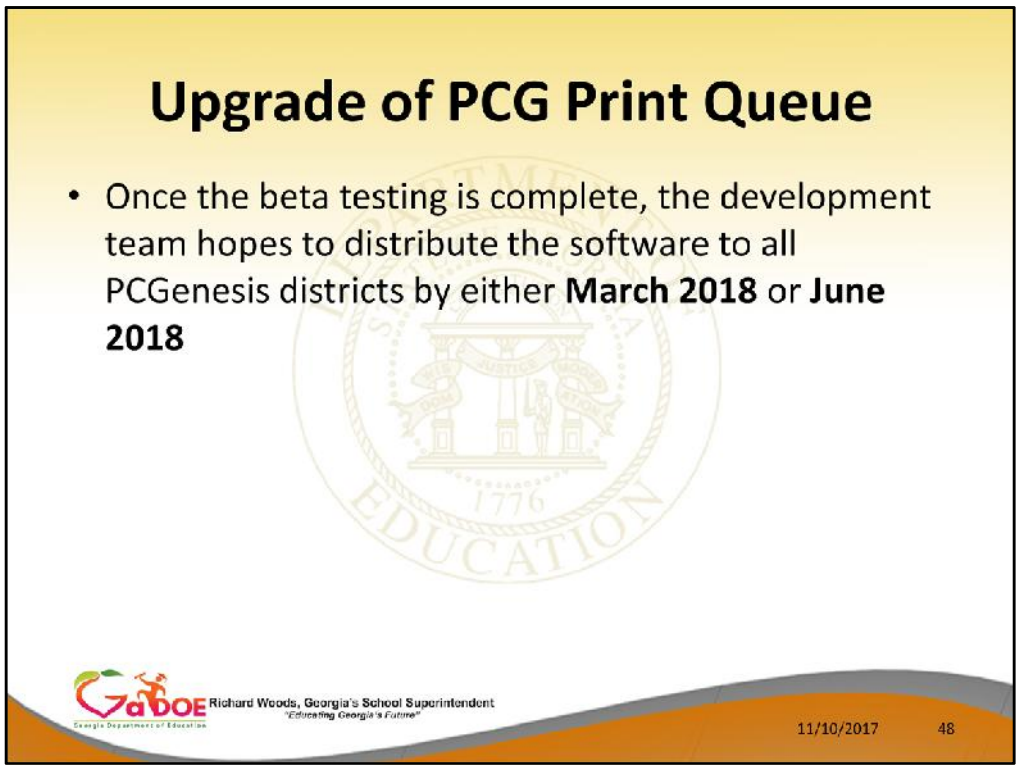
This is Archive View

You will be able to search the archive by:

- E-mail address
- User id who released the file
- From date / to date
- Printer device name
- Document name
- Archive name



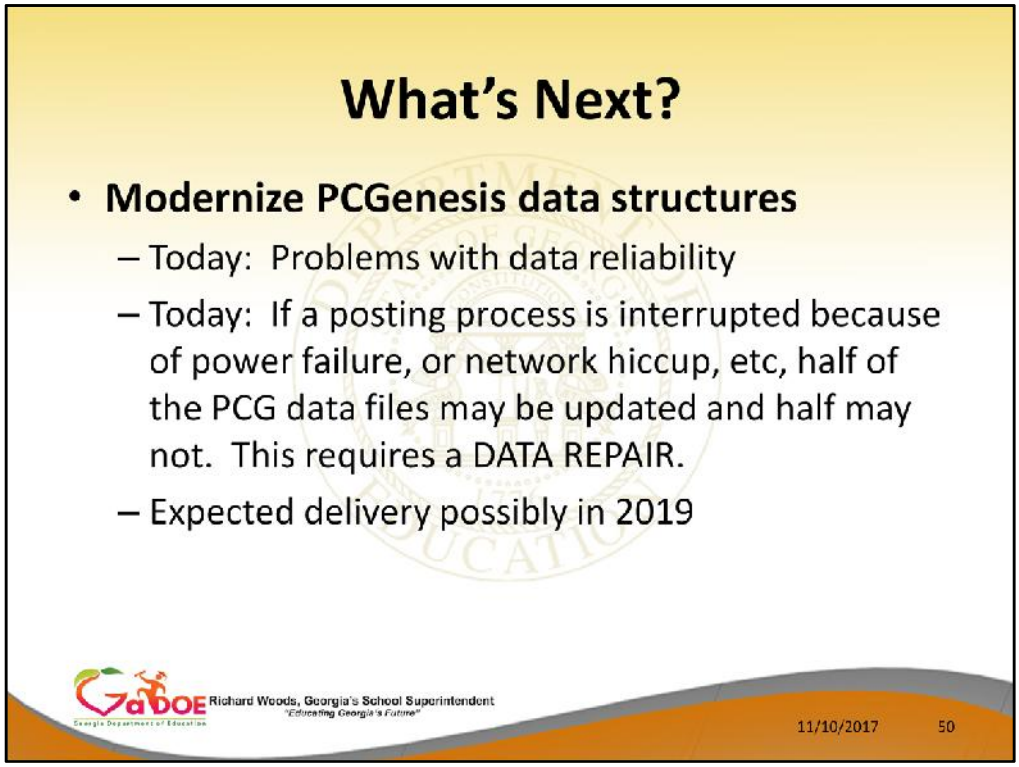
- We will look for several school districts to be a beta for the VerraDyne Print Manager software starting as soon as **January 2018**.
- With the information from the beta, we hope to define the ideal configuration for the VerraDyne Print Manager software that can be rolled out to all PCGenesis sites.
- We will look for a configuration that will give our districts additional functionality without being too complex and causing too much confusion



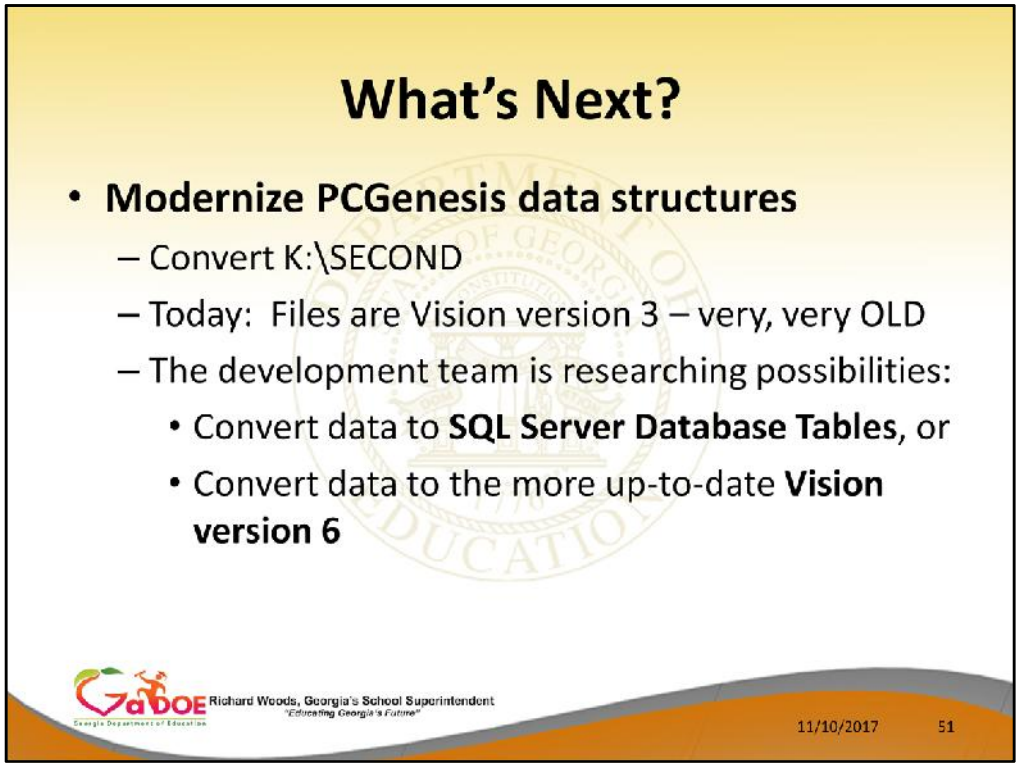
- Once the beta testing is complete, the development team hopes to distribute the software to all PCGenesis districts by either **March 2018** or **June 2018**

Agenda

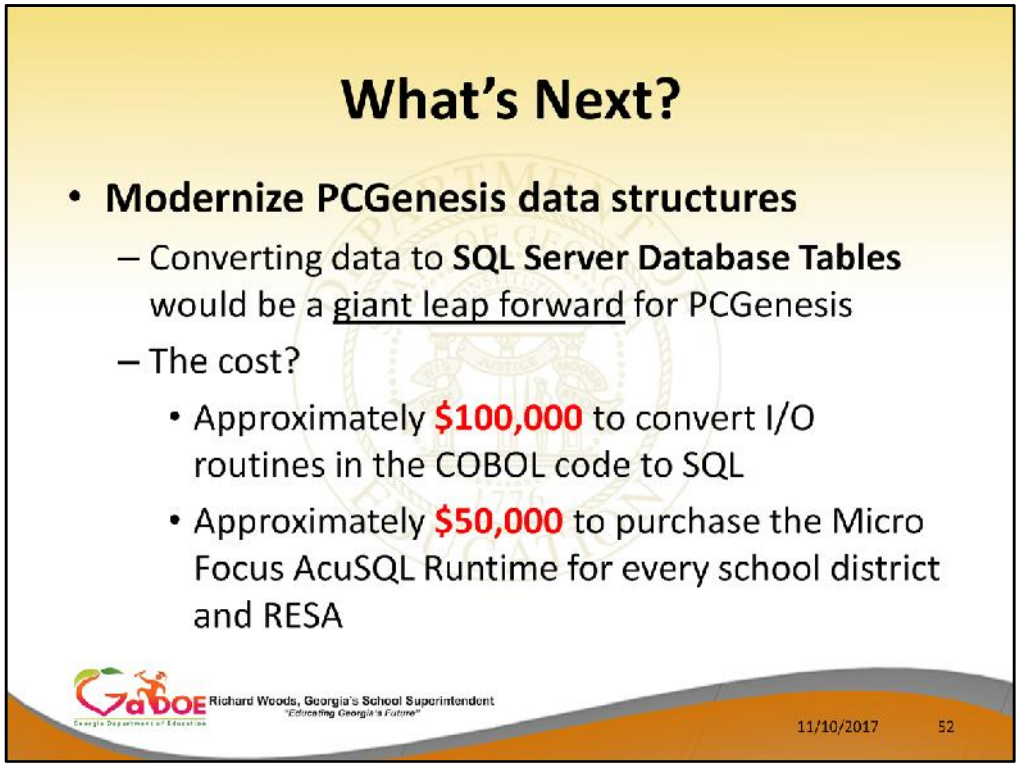
- Introduction
- Upgrade to Micro Focus® Runtime 10.0.1
- Upgrade of PCGenesis Print Queue
- **What's Next**
- Getting Ready for 2018 GHI
- User Input



- **Modernize PCGenesis data structures**
- **Why go to all the trouble of converting the data files?**
- Updating the data files allows us to implement far better transaction processing
- Today, we have problems with data reliability
- Today, if a posting process is interrupted because of a power failure, or network hiccup, etc, half of the PCG data files may be updated (for instance the Receipt file) and half of the files may not be (for instance the AUDIT file).
- This requires a data repair!!
- If possible, we would like to deliver an upgrade of the PCGenesis data file in 2019

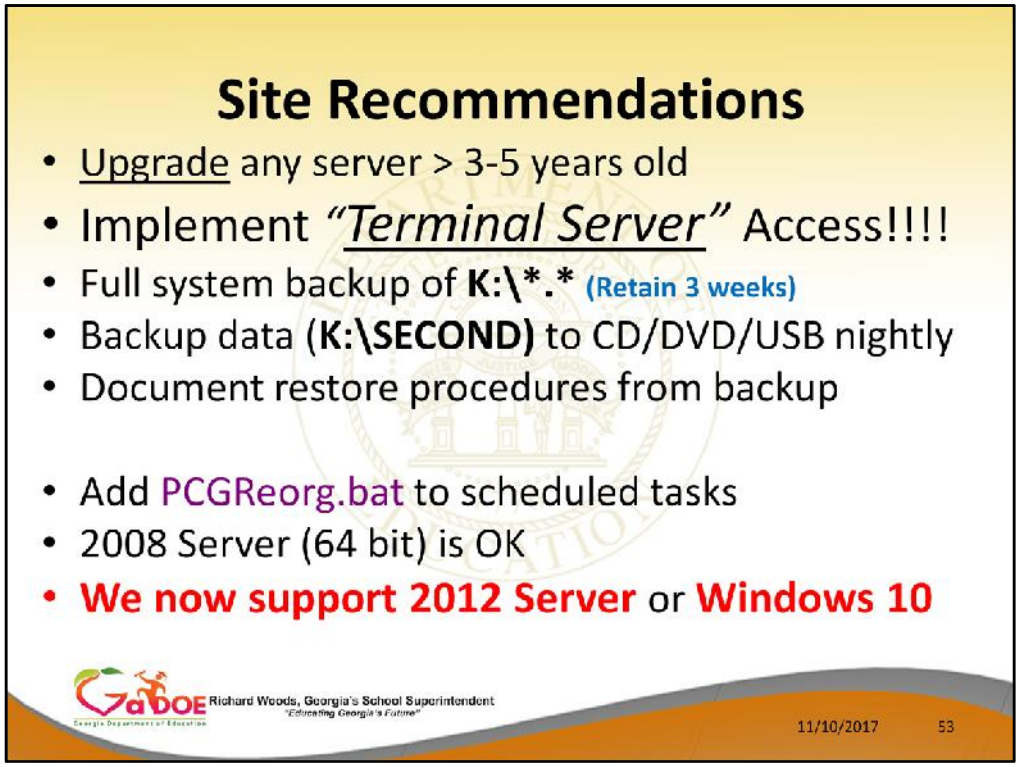


- **Modernize PCGenesis data structures** – this means converting K:\SECOND
- Today PCG data files use Vision version **3** which is very OLD
- The PCGenesis development team is researching the possibilities for upgrading the data
- One possibility: we could upgrade to **Vision version 6**
- Vision version 6 will take each PCG data file and will split it into 2 separate files:
    - one file for the data indices and
    - one file for the actual data
- Accomplishing this will be a very tricky release installation because **all PCG data files will need to be converted at the same time**!
- Another possibility: we could convert the PCGenesis data to SQL Server database tables



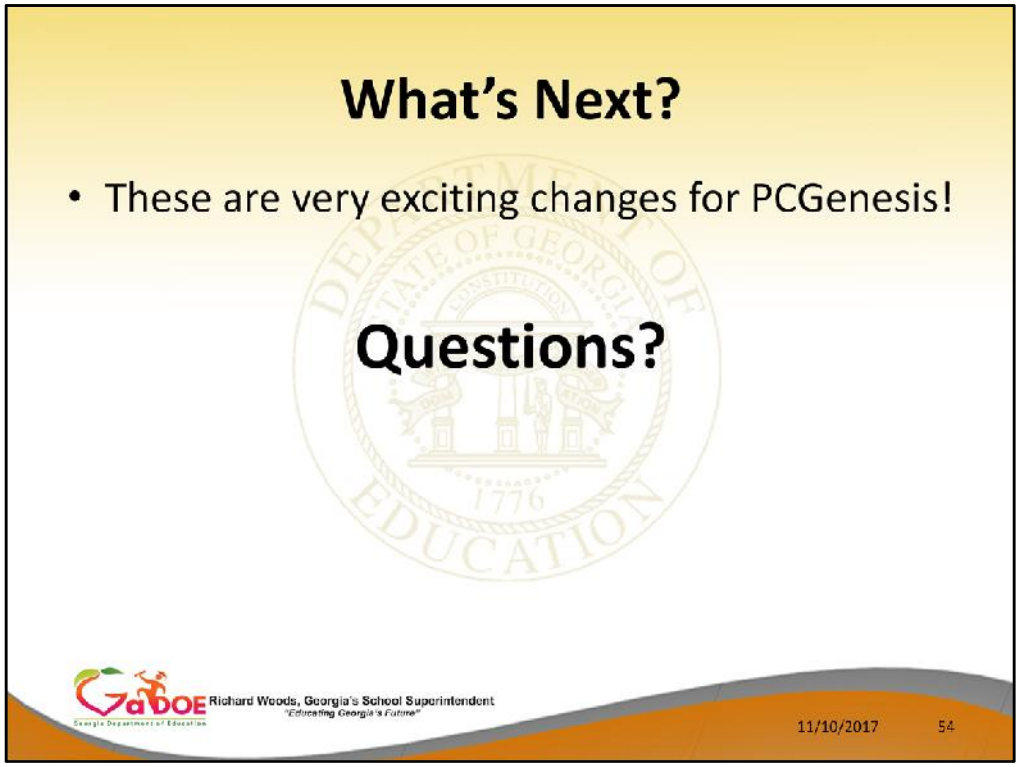
- **Modernize PCGenesis data structures** – this means converting K:\SECOND
- Converting data to **SQL Server Database Tables** would be a giant leap forward for PCGenesis
- **6 Advantages** of a Database Management System over a File System:
    1. Concurrency: Much more control over **multi-user** access to the data
    2. Rich Query Set: There is database language called SQL. It provides a rich, industry-standard query set to manipulate the database contents.
    3. Indexing: Indexing is the process of ordering database entries. It helps to improve the speed of data retrieval operations. Indexing makes searches quicker. It is one of the big advantages of a database management system over a simple file system.
    4. Transaction Processing: The transaction is the sequence of operations to be carried out in a single logical work unit. Transaction processing provides data reliability.
    5. Client Supportive: Users or clients can query the database regardless of whatever programming languages are being used. For example, data in a database can easily be queried using Crystal Reports.
    6. Database management tools: Lots of database management tools are available, especially for backups, database monitoring, and security.
- Database processing is the industry standard and would significantly improve data reliability
- The cost?

- Approximately **$100,000** to convert I/O routines in the COBOL code to SQL
- Approximately **$50,000** to purchase the Micro Focus AcuSQL Runtime for every school district and RESA



- We highly recommend that you upgrade any server that is greater than 3-5 years old
- We highly recommend that you implement *"Terminal Server"* Access!!!!
- Full system backup of **K:*.*** **(Retain 3 weeks)**
- Backup data (**K:\SECOND)** to CD/DVD/USB nightly
- Document your restore procedures from backup

- Add PCGReorg.bat to scheduled tasks
- 2008 Server (64 bit) is OK
- **We now support 2012 Server** or **Windows 10**



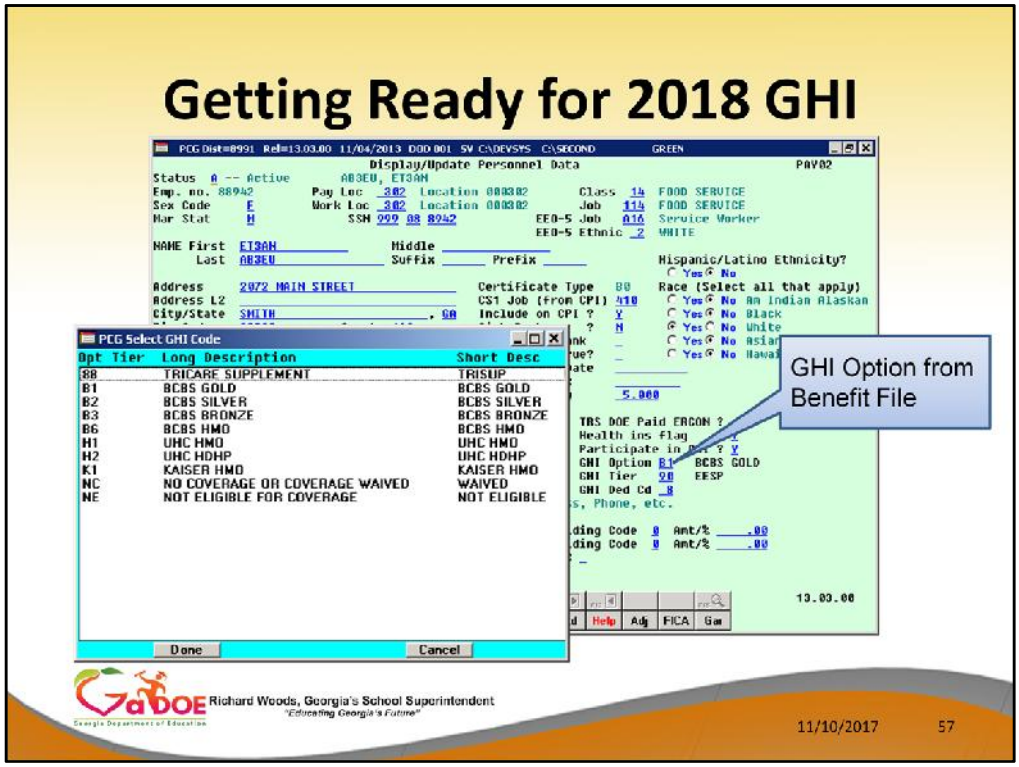
- We are very excited about the upgrades for PCGenesis
- Questions?

Agenda

- Introduction
- Upgrade to Micro Focus® Runtime 10.0.1
- Upgrade of PCGenesis Print Queue
- What's Next
- **Getting Ready for 2018 GHI**
- User Input

The GHI options B1, B2, and B3 are still available for BCBS Gold, Silver and Bronze plans.
The GHI option B6 has been added for BCBS HMO.
The GHI option H1 has been added for United HealthCare HMO.
The GHI option H2 has been added for United HealthCare HDHP.
The GHI option K1 has been added for Kaiser HMO.

Almost all GHI premium amounts have changed for 2018.



This is a complete list of the 2018 GHI options.

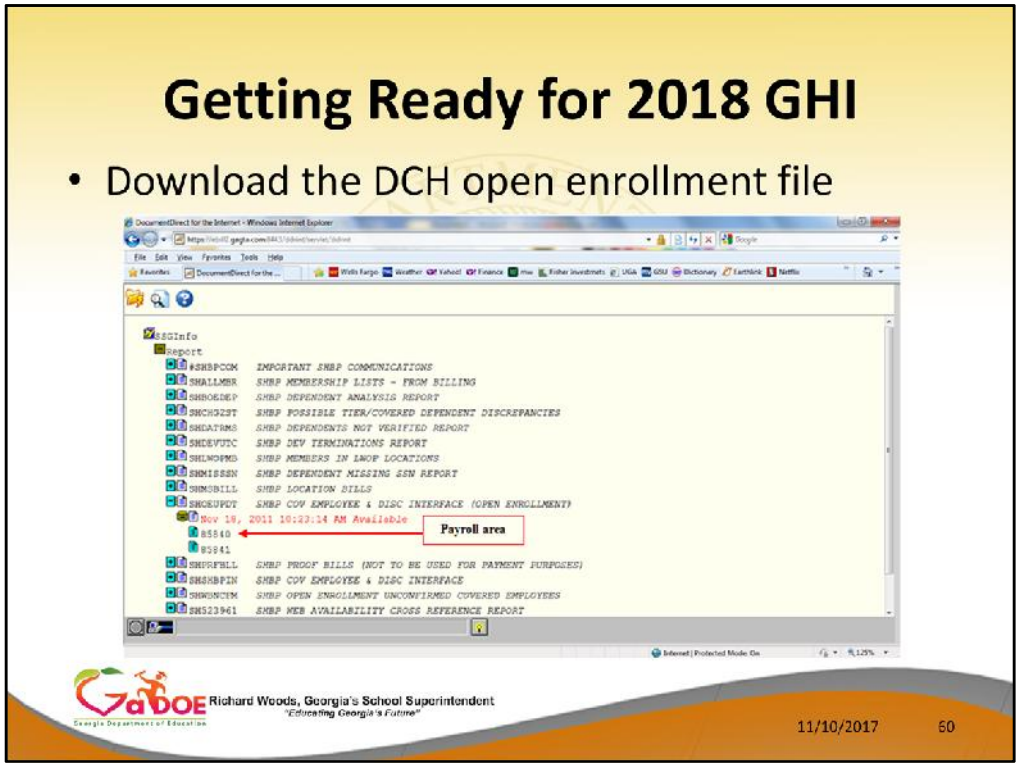
Blue Cross/Blue Shield, United Healthcare, Kaiser and TriCare Supplement make up the available options for employees.

- GHI tiers 10, 40, 90, 91, 94 – 97 are the same.

Several steps are necessary to get ready to process GHI in 2018. Before your December payroll, you will be able to install the 17.03.01. This release will contain the 2018 GHI premiums. The new premiums will be uploaded automatically by the release.

After open enrollment is completed, the new employee GHI elections must be downloaded from the DCH website before the enrollment data can be imported into the PCG personnel screen.

Once the GHI elections have been finalized, the last step is to update the employees' deduction screen with the 2018 premium amounts for the GHI deductions based upon the employees' GHI option and tier information on the personnel screen.

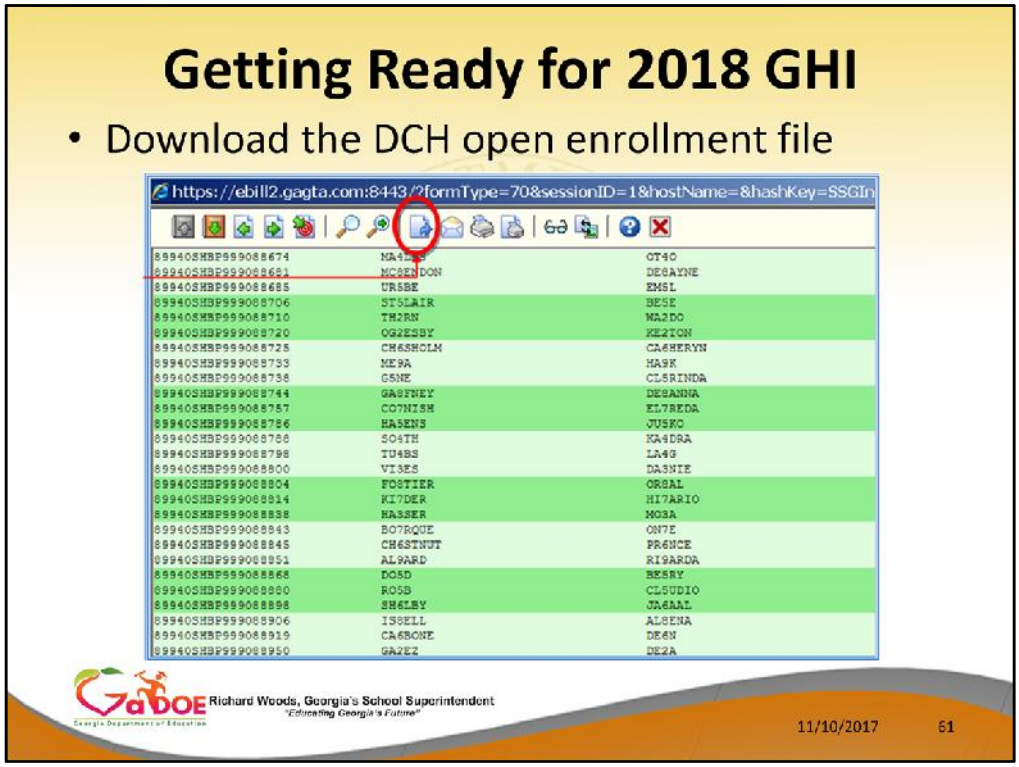


The most difficult part of this process is downloading the enrollment data from DCH. It seems that every year the DCH website changes and honestly, I don't know what to expect this year with the new ADP interface.

Typically, SHBP will send all districts an e-mail which identifies the correct SHOEUPDT file which contains the open enrollments. You must know the exact name and date of this file from SHBP or you will download an incorrect file!

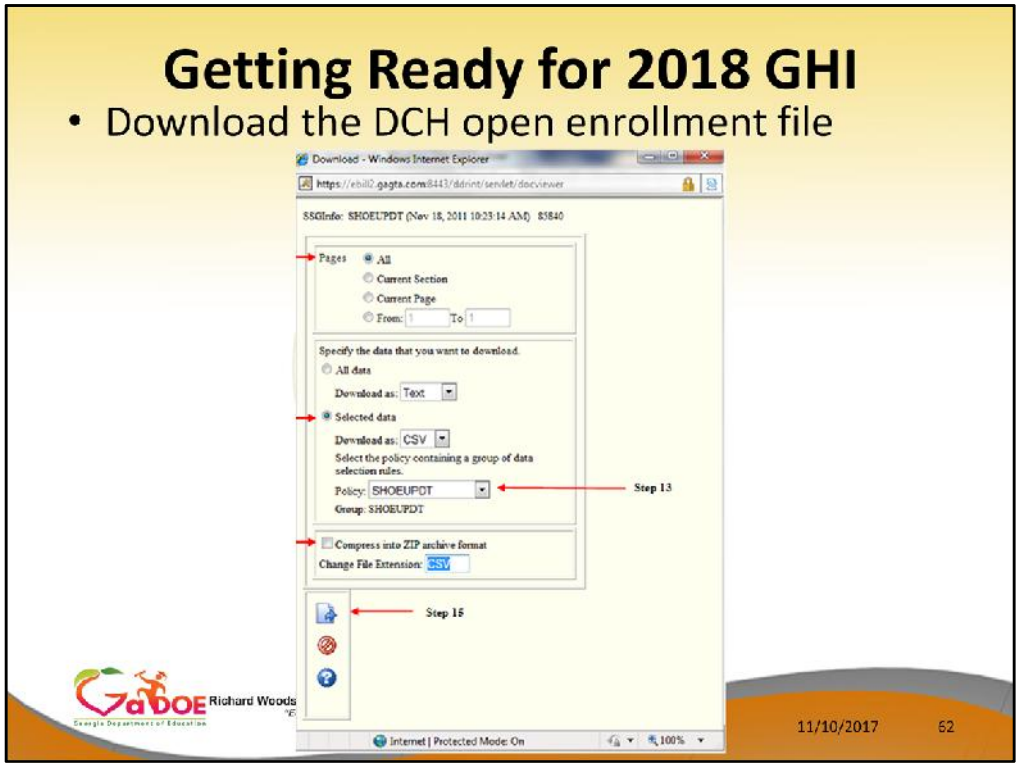
In this example, the correct file was SHOEUPDT dated November 18, 2011.

Select the correct file.



The open enrollment file is displayed.

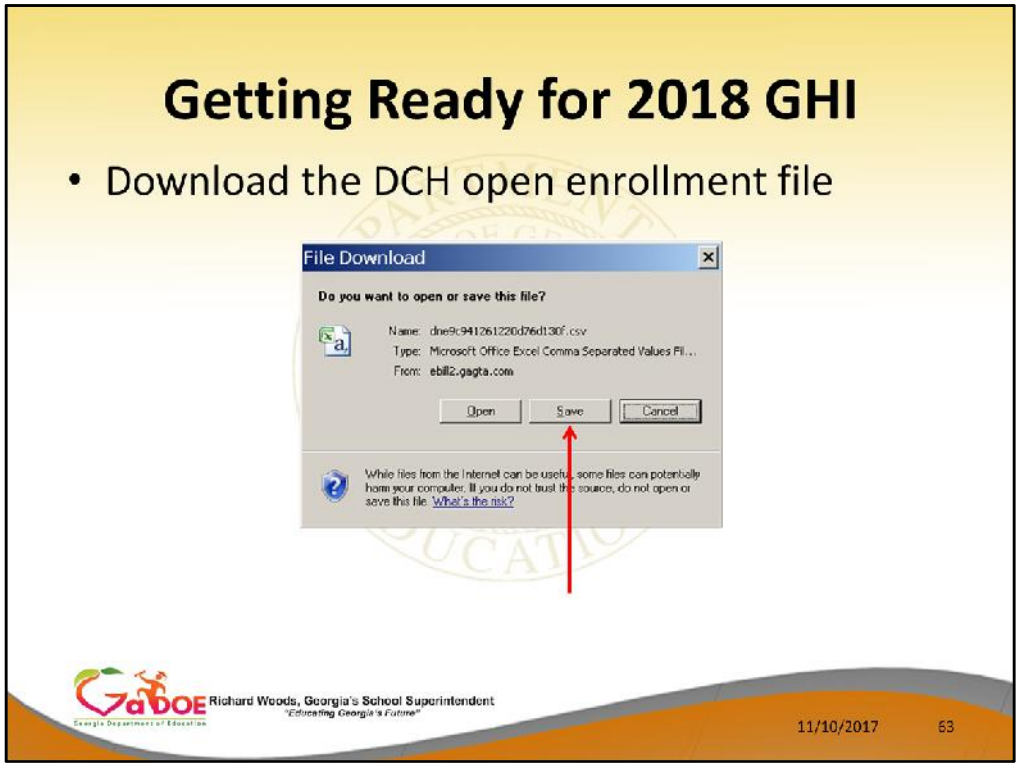
Select the download icon.



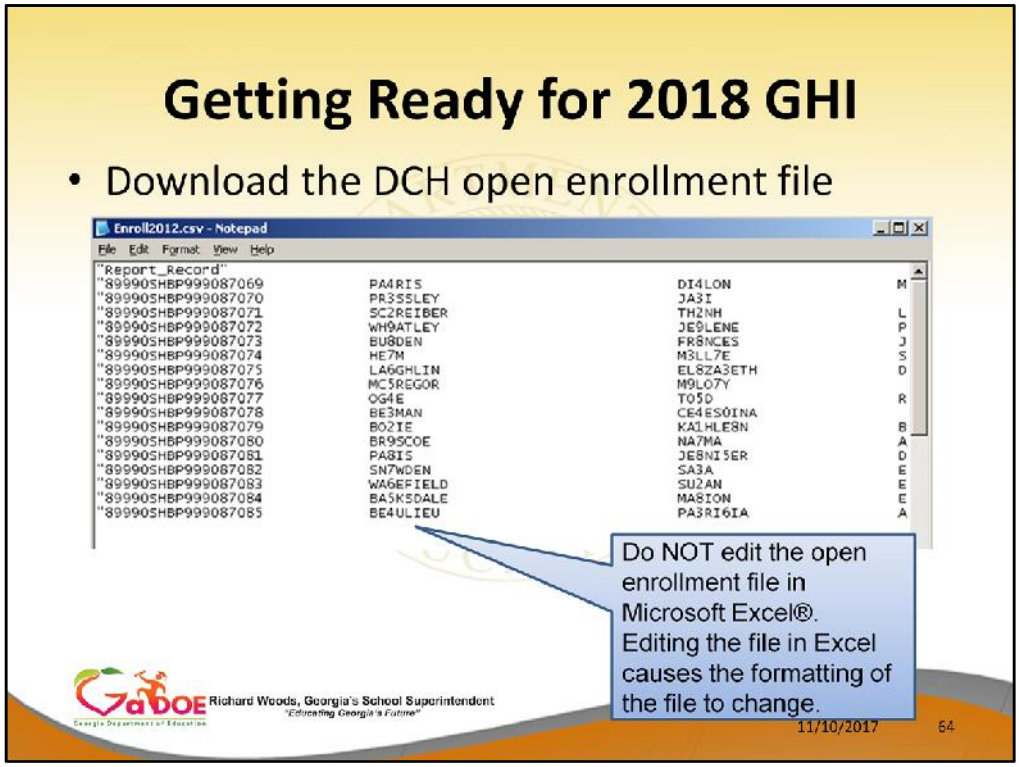
The following dialog box will be displayed. It is important to enter the selections as shown above:

- All pages
- Selected data
  - Download as CSV
  - Policy SHOEUPDT
- Do NOT compress the file

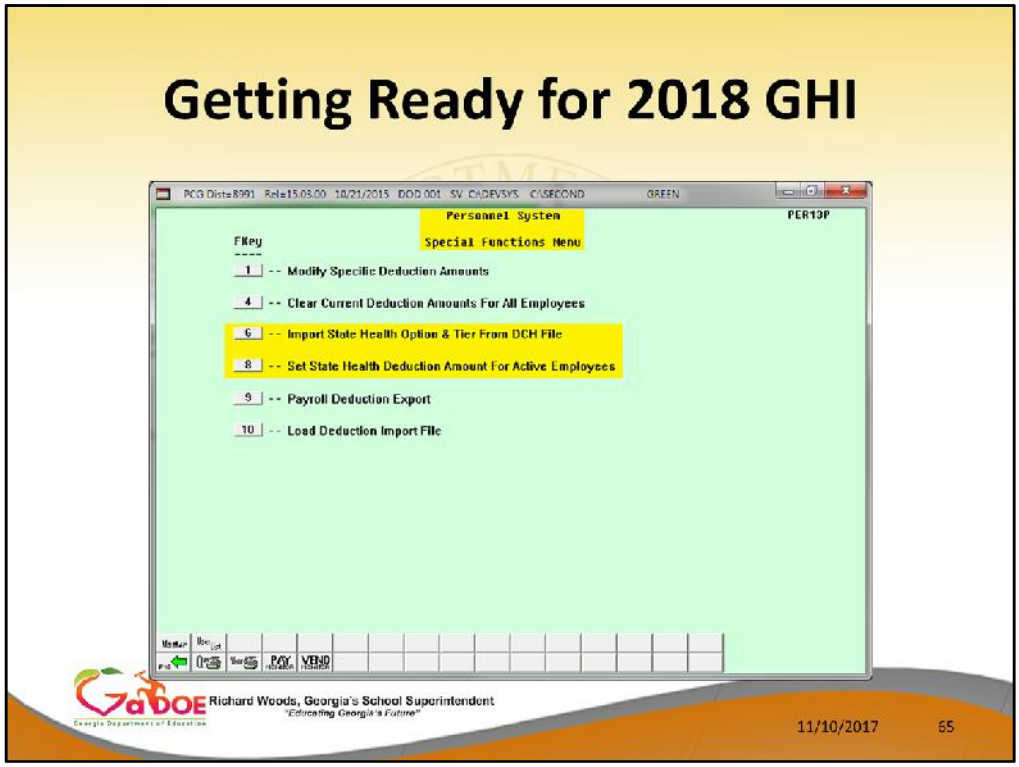
Then select the download icon.



Select SAVE to save the file to your C drive.



Once the open enrollment file has been downloaded, do NOT edit the file in Excel! Editing the file in Excel causes the formatting of the file to change. Instead, make any changes using NOTEPAD.



Now the final two steps of the GHI Open Enrollment process:

1) Import State Health Option & Tier from DCH File = F6
2) Set State Health Deduction Amount For Active Employees = F8

You must execute BOTH of these steps!!!

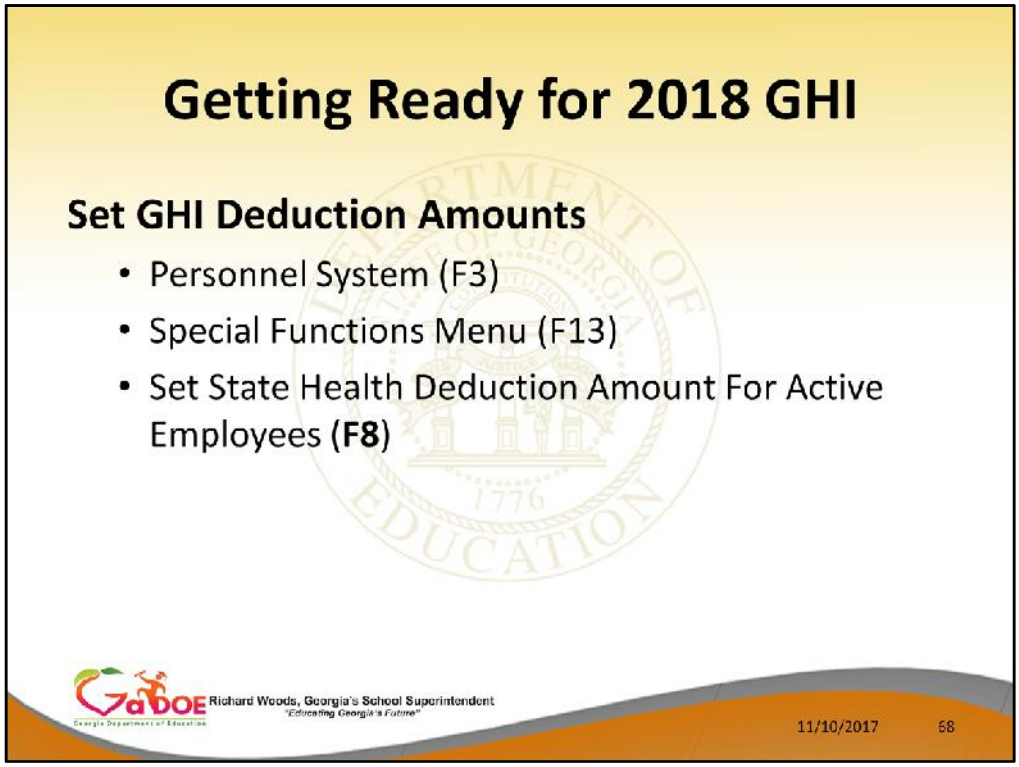
Personnel and deduction screens must be updated for the December payroll with the new options that the employee selected during open enrollment.

The file downloaded from SHBP can be imported into PCGenesis.

Use F10 to browse for the file.

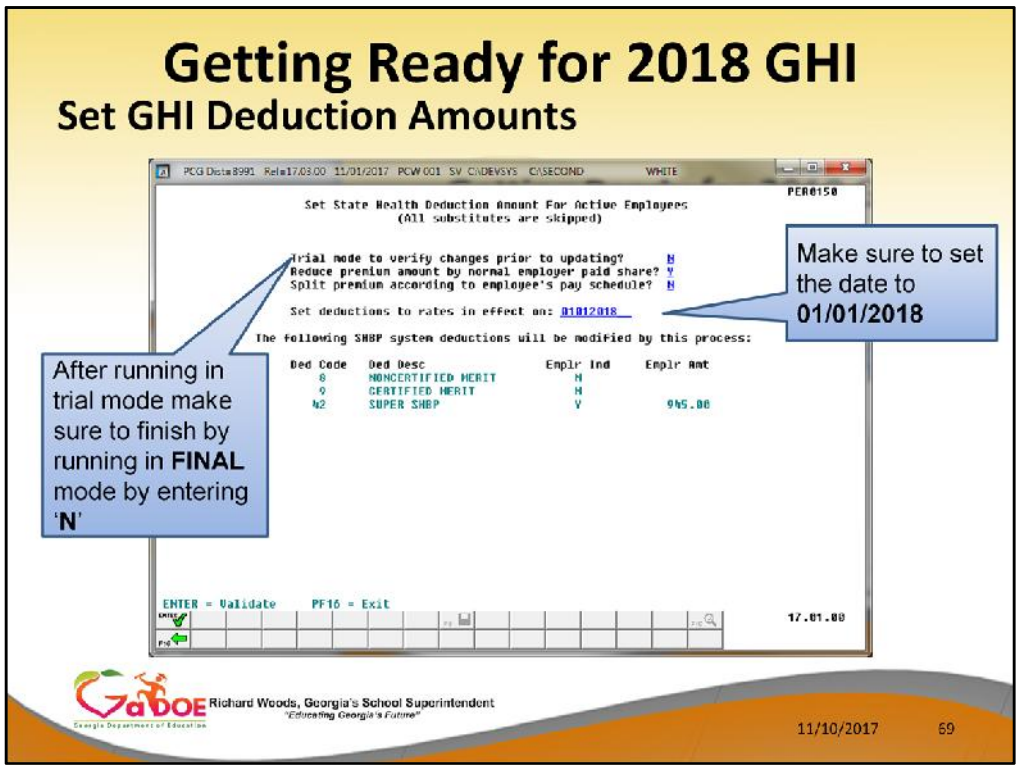
Importing the County is optional.

Using this process only enters the **option** and **tier** from the imported file to the personnel screen. It does NOT update any amounts on the deduction screen.



After the correct option and tier is entered (or imported) on the personnel screen for each employee, the premium can be updated on the deduction screen using this procedure.

The premium was not updated with the prior import, so this procedure must also be completed.



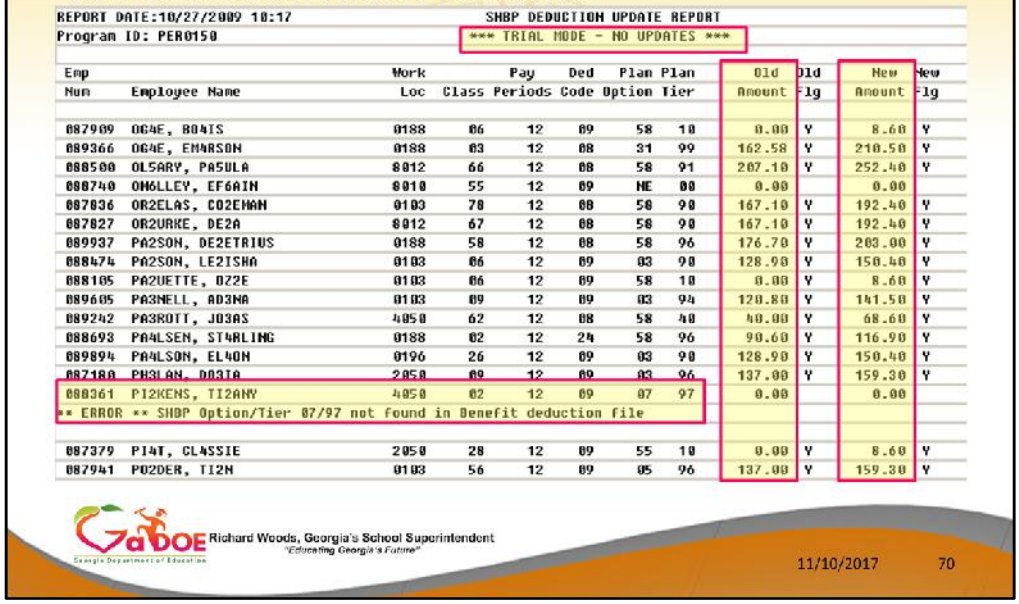
Before running this procedure, the new option and tier choices should be entered on the personnel screen. It is also important to have the correct GHI deduction code entered on the personnel screen.

This procedure should be run in trial mode first. The trial mode will not update the deduction screen, but a report will be produced that contains all of the changes that will be made.

Review the report to make sure it is correct and then run the update again with the **trial mode flag** switched to **N**. **This will update all of the employee premiums on the deduction screen** to match the premiums set in the GHI Plan/Option/Tier maintenance file.

Getting Ready for 2018 GHI

Set GHI Deduction Amounts



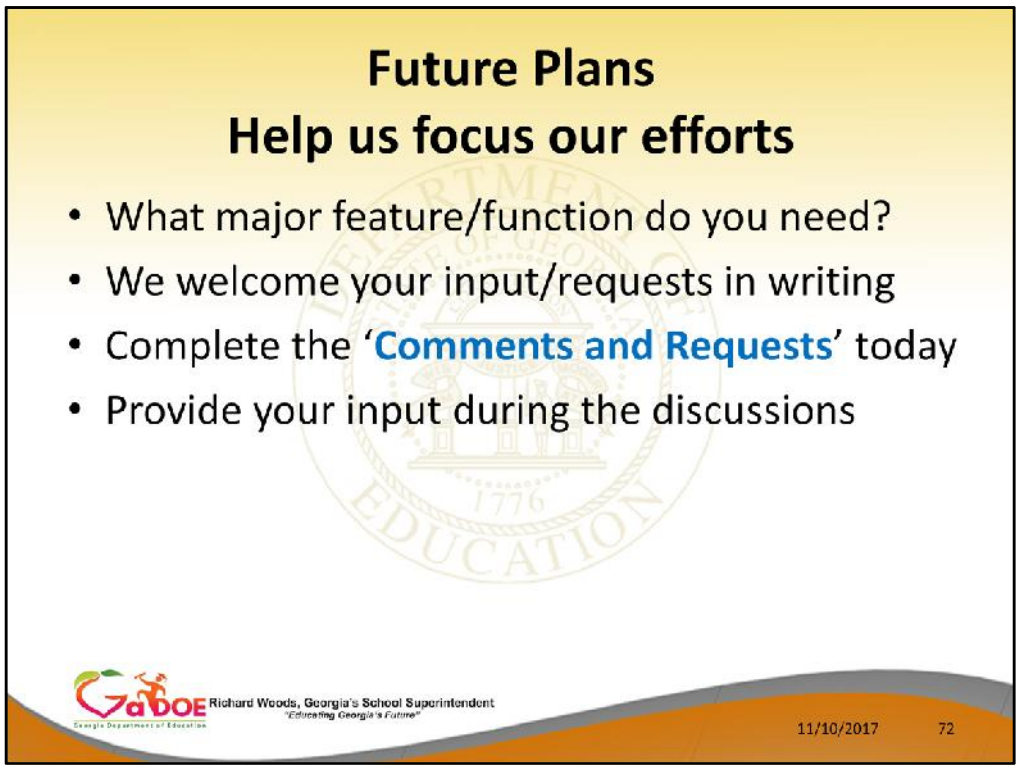
REPORT DATE:10/27/2009 10:17 — SHBP DEDUCTION UPDATE REPORT
Program ID: PER0150 — *** TRIAL MODE - NO UPDATES ***

Emp Num	Employee Name	Work Loc	Class	Pay Periods	Ded Code	Plan Option	Plan Tier	Old Amount	Old Flg	New Amount	New Flg
087909	OG4E, B04IS	0188	06	12	09	58	10	0.00	Y	8.60	Y
089366	OG4E, EM4RSON	0188	03	12	08	31	99	162.58	Y	210.50	Y
088500	OL5ARY, PA5ULA	8012	66	12	08	58	91	207.10	Y	252.40	Y
080740	OM6LLEY, EF6AIN	8010	55	12	09	NE	00	0.00		0.00	
087836	OR2ELAS, CO2EMAN	0103	78	12	08	58	90	167.10	Y	192.40	Y
087827	OR2URKE, DE2A	8012	67	12	08	58	90	167.10	Y	192.40	Y
089937	PA2SON, DE2ETRIUS	0188	58	12	08	58	96	176.70	Y	203.00	Y
088474	PA2SON, LE2ISHA	0103	06	12	09	03	90	128.90	Y	150.40	Y
088105	PA2UETTE, OZ2E	0103	06	12	09	58	10	0.00	Y	8.60	Y
089605	PA3NELL, AD3NA	0103	09	12	09	03	94	120.80	Y	141.50	Y
089242	PA3ROTT, JO3AS	4050	62	12	08	58	40	40.00	Y	68.60	Y
088693	PA4LSEN, ST4RLING	0188	02	12	24	58	96	90.60	Y	116.90	Y
089894	PA4LSON, EL4ON	0196	26	12	09	03	90	128.90	Y	150.40	Y
087180	PH3LAN, DO3IA	2050	09	12	09	03	96	137.00	Y	159.30	Y
088361	PI2KENS, TI2ANY	4050	02	12	09	07	97	0.00		0.00	
** ERROR ** SHBP Option/Tier 07/97 not found in Benefit deduction file											
087379	PI4T, CL4SSIE	2050	28	12	09	55	10	0.00	Y	8.60	Y
087941	PO2DER, TI2M	0103	56	12	09	05	96	137.00	Y	159.30	Y

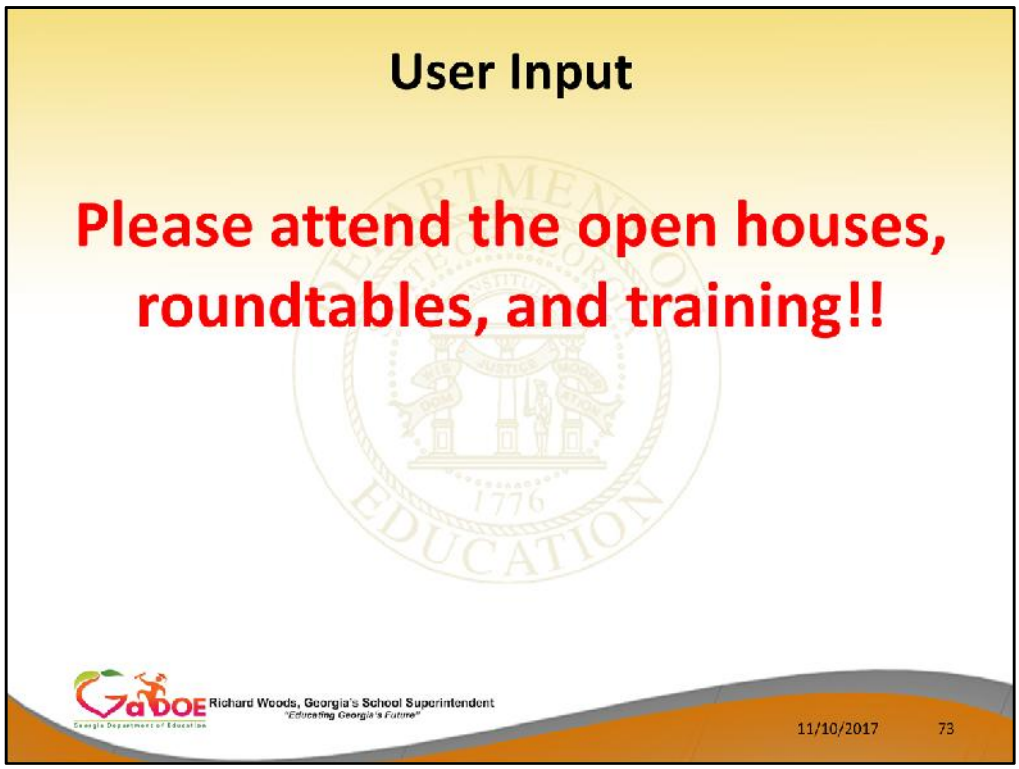
Verify the enrollment data and premium data on this report before running the process in FINAL mode.

Agenda

- Introduction
- Upgrade to Micro Focus® Runtime 10.0.1
- Upgrade of PCGenesis Print Queue
- What's Next
- Getting Ready for 2018 GHI
- **User Input**



- In order for the PCGenesis development team to focus our efforts, we would greatly appreciate your input.
- We welcome your requests in writing – you can complete the 'Comments and Requests' forms today.
- We also welcome your input during the roundtable discussions which are on the GASO schedule.

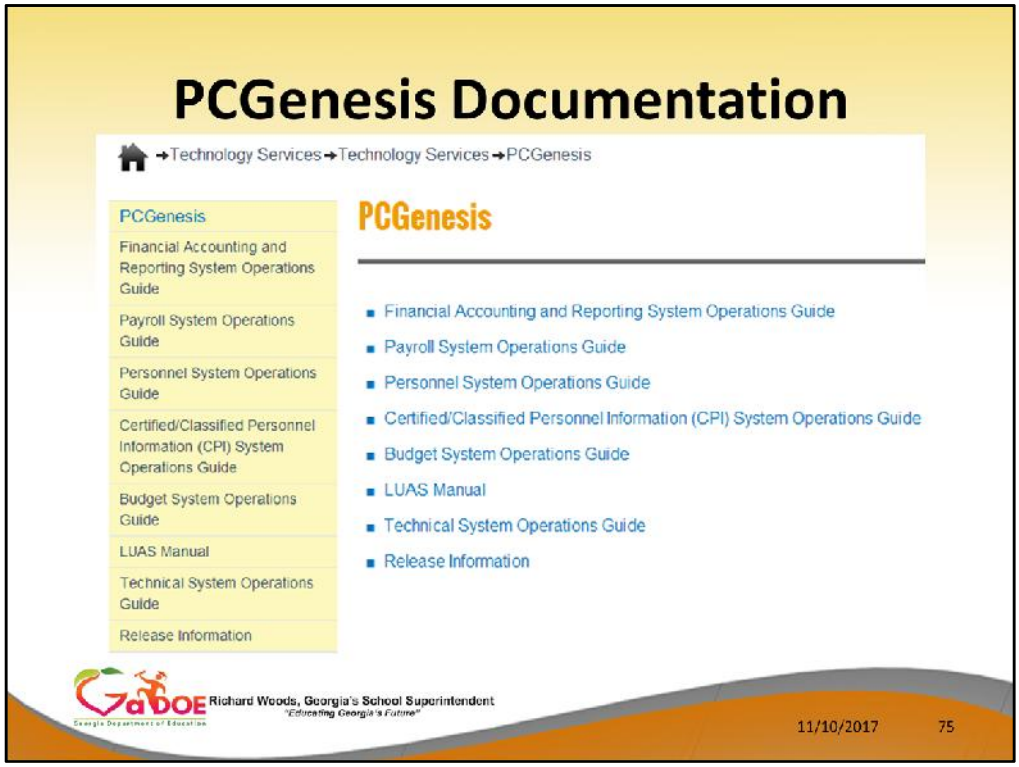


Again, please attend the open houses, roundtables, and training!

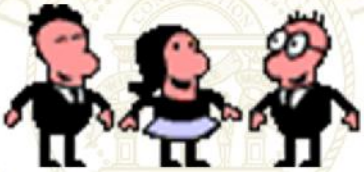
PCGenesis Documentation

http://www.gadoe.org/Technology-Services/PCGenesis/Pages/default.aspx

PCGenesis Documentation



Questions?



Thank you for attending!